



Connecting Buyers and Suppliers

# **Creating, Managing, and Awarding Solicitations in OhioBuys**

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Prepared for agency end users responsible for creating, approving, managing, and awarding solicitations in OhioBuys.

# Table of Contents

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- 1) [In This Document](#)
- 2) [Creating and Preparing Solicitations](#)
  - a) [Create a Sourcing Project](#)
  - b) [Manage Solicitation Team Members and Roles](#)
  - c) [Define a Solicitation Project Schedule](#)
  - d) [Gather Requirements for a Solicitation](#)
  - e) [Upload and Manage Solicitation Documents](#)
  - f) [Complete the Prepare a Solicitation Tab](#)
  - g) [Setup Mandatory, Financial, and/or Technical Questionnaires for a Solicitation](#)
  - h) [Invite Potential Bidders and/or Suppliers to Respond to a Solicitation](#)
  - i) [Define Preference Factors](#)
  - j) [Setup a Solicitation Item Grid](#)
  - k) [Submit a Solicitation for Review and Approval](#)
- 3) [Reviewing and Approving Solicitations](#)
  - a) [Review and Approve a Solicitation](#)
  - b) [Post a Solicitation](#)
- 4) [Managing Solicitations](#)
  - a) [Create and Issue New Lots and Rounds](#)
  - b) [Review Sourcing Activity](#)
  - c) [Answer Supplier Questions](#)
  - d) [Cancel a Solicitation](#)
- 5) [Analyzing and Awarding Solicitations](#)
  - a) [Open Solicitation Responses](#)
  - b) [Review Bidder/Supplier Submitted Responses and Attachments](#)
  - c) [Request Bidder/Supplier Clarifications Without a New Lot/Round](#)
  - d) [Complete Response Evaluations \(Simple or Single Envelope\)](#)
  - e) [Complete Response Evaluations \(Double or Triple Envelope\)](#)
  - f) [Review Response Evaluations](#)
  - g) [Analyze Submitted Responses](#)
  - h) [Create Award Scenarios and Award a Solicitation](#)
  - i) [Award a Solicitation](#)
- 6) [Appendix](#)
  - a) [Evaluation and Award based on Combined Technical and Cost Score](#)

# In This Document:

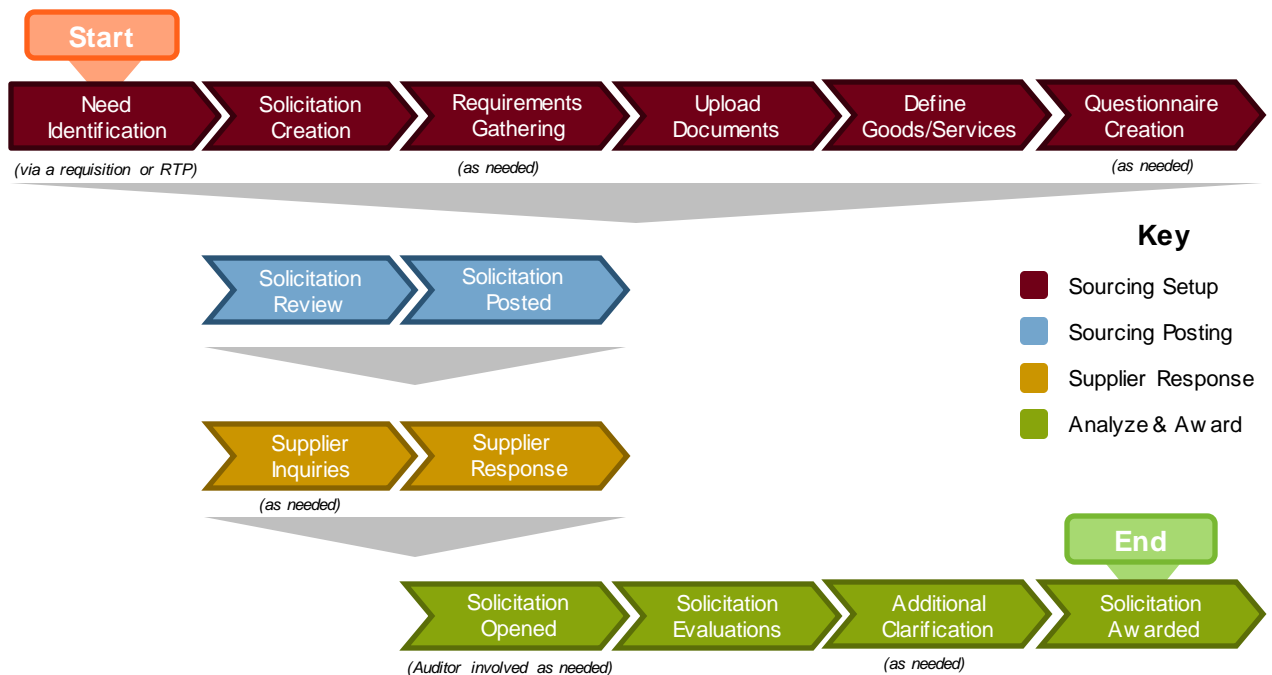
## Overview:

This learner guide covers the core activities related to creating, reviewing, approving, and managing solicitations in OhioBuys.

## Please Note:

This learner guide does not cover Quick Quotes. Users looking for guidance around Quick Quotes should refer to the Quick Quote learner guide instead.

## Processes Covered:



# In This Document:

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## Processes Covered (cont.):

- 1) **Sourcing Setup:** OhioBuys provides a unified platform for sourcing activities relevant to the State of Ohio. Users have the ability to create a variety of solicitations to suit their needs, as well as access to OhioBuys's powerful search tools to identify and contact Suppliers.
- 2) **Review and Posting:** OhioBuys allows for robust teaming capabilities when working on solicitations at nearly every step. Users can establish a team with specific permissions applicable to each teammate and approver; and solicitations are automatically routed to the reviewers that need to see them.
- 3) **Supplier Response and Management:** OhioBuys makes it easy for users to keep track of their active solicitations by reviewing Supplier activity and responding to inquiries. Users can modify existing solicitations with new lots and rounds as required by the sourcing need.
- 4) **Analyzing and Awarding:** Users have access to tools in OhioBuys to open and analyze Supplier responses side-by-side. Once a winner has been selected, users can notify the Supplier directly within OhioBuys and update any relevant purchase requisitions based on the results of the award.

# Navigating This Document

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## Sourcing Project Types in OhioBuys:

- **Simple Solicitation** : Solicitations that allow agencies to create and distribute Requests for Information (RFI) and Requests for Quotes (RFQs). Also used for Cancellations.
- **Single Envelope**: Solicitations in which Bidders and/or Suppliers are instructed to submit all aspects of a response in a single envelope. Can optionally be awarded via reverse auction.
- **Double Envelope**: Solicitations in which Bidders and/or Suppliers are instructed to submit both technical and financial responses in two separate and sealed envelopes.
- **Triple Envelope**: Solicitations in which Bidders and/or Suppliers are instructed to submit technical, financial, and mandatory responses in three separate and sealed envelopes.
- **Quick Quote**: A quick quote is a simplified short-term solicitation process. Please refer to the Quick Quotes Learner Guide for more information on this solicitation type.
- **Public Notice**: Notifies the public of a solicitation that will be evaluated and awarded outside of OhioBuys.

# Navigating This Document (cont.)

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
<b>Creating and Preparing Solicitations</b>					
<a href="#">Create a Sourcing Project</a>	✓	✓	✓	✓	✓
<a href="#">Manage Solicitation Team Members and Roles</a>	✓	✓	✓	✓	✓
<a href="#">Define a Solicitation Project Schedule</a>	✓	✓	✓	✓	✓
<a href="#">Gather Requirements for a Solicitation</a>	✓	✓	✓	✓	✓
<a href="#">Upload and Manage Solicitation Documents</a>	✓	✓	✓	✓	✓
<a href="#">Complete the Prepare a Solicitation Tab</a>	✓	✓	✓	✓	✓
<a href="#">Setup Mandatory, Financial, and/or Technical Questionnaires for a Solicitation</a>		✓	✓	✓	
<a href="#">Invite Potential Bidders and/or Suppliers to Respond to a Solicitation</a>	✓	✓	✓	✓	✓
<a href="#">Define Preference Factors</a>					
<a href="#">Setup a Solicitation Item Grid</a>	✓	✓	✓	✓	
<a href="#">Submit a Solicitation for Review and Approval</a>	✓	✓	✓	✓	✓
<b>Reviewing and Approving Solicitations</b>					
<a href="#">Review and Approve a Solicitation</a>	✓	✓	✓	✓	✓
<a href="#">Post a Solicitation</a>	✓	✓	✓	✓	✓
<b>Managing Solicitations</b>					
<a href="#">Create and Issue New Lots and Rounds</a>	✓	✓	✓	✓	
<a href="#">Review Sourcing Activity</a>	✓	✓	✓	✓	
<a href="#">Answer Supplier Questions</a>	✓	✓	✓	✓	✓
<a href="#">Use the Sourcing Blog</a>	✓	✓	✓	✓	
<a href="#">Cancel a Solicitation</a>	✓	✓	✓	✓	✓
<b>Analyzing and Awarding Solicitations</b>					
<a href="#">Open Solicitation Responses</a>	✓	✓	✓	✓	
<a href="#">Review Bidder/Supplier Submitted Responses and Attachments</a>	✓	✓	✓	✓	
<a href="#">Complete Response Evaluations (Simple or Single Envelope)</a>	✓	✓			
<a href="#">Complete Response Evaluations (Double or Triple Envelope)</a>			✓	✓	
<a href="#">Review Response Evaluations</a>	✓	✓	✓	✓	
<a href="#">Analyze Submitted Responses</a>	✓	✓	✓	✓	
<a href="#">Create Award Scenarios</a>	✓	✓	✓	✓	
<a href="#">Award a Solicitation</a>	✓	✓	✓	✓	

# Key Terms

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The following are key terms that you will see referenced throughout this learner guide.

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- 1) **RFx:** A solicitation in OhioBuys that is composed of lots and rounds. An RFx is always associated to a Sourcing Project; a Sourcing Project may have multiple RFx's associated to it.
- 2) **Sourcing Project:** Any kind of sourcing event in OhioBuys. This includes all types of solicitations, as well as Quick Quotes. Sourcing projects can have multiple lots and/or rounds.
- 3) **Questionnaire:** Used to gather information and the necessary inputs for the mandatory, technical, and/or financial questionnaires of a solicitation. Can also be used to gather requirements from State users to help develop the scope of work (SOW).
- 4) **Requirements Gathering:** The process of a project owner sending out questionnaires to internal stakeholders to determine the scope of work (SOW) for a solicitation.
- 5) **Item Grid:** Functionality that allows users to configure the items they want the Supplier to submit responses for when replying to the Solicitation. This is equivalent to a cost summary or price sheet.
- 6) **Project Schedule:** A structured schedule of tasks associated with a solicitation created by the project owner and assigned to team members.
- 7) **Lots:** A new lot is typically issued for Bidder and/or Supplier clarifications. Lots can be used to clarify information or separate the different needs for a specific solicitation. For example, a procurement user may wish to separate a solicitation for a conference into different lots. One lot could be created for food, while another could be created for IT equipment.
- 8) **Rounds:** A new round is typically issued whenever there is amendment to the original solicitation or when you want to issue a second round of bidding for a shortlisted group of Bidders and/or Suppliers.

# CREATING AND MANAGING SOLICITATIONS

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## Topics

- Create a Sourcing Project
- Manage Solicitation Team Members and Roles
- Define a Solicitation Project Schedule
- Gather Requirements for a Solicitation
- Upload and Manage Solicitation Documents
- Complete the Prepare a Solicitation Tab
- Setup Mandatory, Financial, and/or Technical Questionnaires for a Solicitation
- Setup a Solicitation Item Grid
- Define Preference Factors for a Solicitation
- Invite Potential Bidders and/or Suppliers to Respond to a Solicitation
- Submit a Solicitation for Review and Approval



# CREATE A SOURCING PROJECT

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
Creating and Preparing Solicitations					
Create a Sourcing Project	✓	✓	✓	✓	✓

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## Overview:

- What's Covered: The process for initiating a new solicitation in OhioBuys.
- Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
- Used When: Starting a new solicitation

## Step-by-Step Instructions for Creating a Sourcing Project

The following Sourcing Project Types are available in OhioBuys:

1. **Simple Solicitation** : Solicitations that allow agencies to create and distribute Requests for Quotes (RFQs).
2. **Single Envelope**: Solicitations in which Bidders and/or Suppliers are instructed to submit all aspects of a response in a single envelope. Can optionally be awarded via reverse auction.
3. **Double Envelope**: Solicitations in which Bidders and/or Suppliers are instructed to submit both technical and financial responses in two separate and sealed envelopes.
4. **Triple Envelope**: Solicitations in which Bidders and/or Suppliers are instructed to submit technical, financial, and mandatory responses in three separate and sealed envelopes.
5. **Quick Quote**: A quick quote is a simplified short-term solicitation process. A quick quote is a simplified short-term solicitation process. Please refer to the Quick Quotes Learner Guide for more information on this solicitation type.
6. **Public Notice**: Notifies the public of a solicitation that will be evaluated and awarded outside of OhioBuys.

1

Log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Create Sourcing Project** from the drop-down menu.

The Create Sourcing Project page is displayed. On this page, you will need to complete the **Sourcing General Information** section. Note that any fields with a red asterisk are mandatory and must be completed to continue.

The screenshot shows the 'Sourcing General Information' form. It includes fields for Solicitation ID, Label (mandatory), Project Type (mandatory), Status (mandatory, defaulting to 'In progress'), Contracting Entity (mandatory), Participating Organizations, Commodities (mandatory), Other Commodities, Project Start Date (mandatory, defaulting to 2/25/2021), Market Type, Request to Purchase, and Index Number. There are checkboxes for 'Save as a template' and 'Confidential Sourcing Project'.

2

- a) Update the **Label: Project Name** field with the name for the sourcing project. This field is visible to Suppliers and must contain a brief, straightforward description of the purpose of the solicitation. If creating the solicitation from a purchase requisition, this field will default to the purchase requisition label and should be updated so that the needs of the solicitation are easily understandable for potential Bidders and/or Suppliers.
- b) Select the **Project Type**.
- c) Indicate the **Status**: Defaults to *In Progress*. This field should always be left as *In Progress*.

## Step-by-Step Instructions for Creating a Sourcing Project

**Sourcing General Information**

Solicitation ID ☐ Save as a template ☐ Confidential Sourcing Project

Label \*

Project Type \* Status \*

Contracting Entity \* Participating Organizations

Commodities \* Other Commodities

Project Start Date \* 2/25/2021

Market Type Request to Purchase

Index Number

- d) Select the **Contracting Entity**. This field is typically the agency or group responsible for initiating the solicitation.
- e) **Participating Organizations**: Select any organization allowed to access and purchase items from the solicitation. If the RFP is for a particular agency, select the agency from the drop-down list. If the RFP is an enterprise contract for all agencies select "State Agencies", if the RFP is an enterprise contract that will be available to State agencies and co-ops, select OHIO.
- 2 f) **Commodities and Other Commodities**: The Commodity code selected will drive which suppliers are notified if a commodity notification is used. (Note: For MBE set-aside solicitations all certified MBE's will be notified, regardless of the commodity codes selected.)

Note: Offerors can still participate even if they are not listed under the associated commodities.

Note: MBE Set-aside RFPs must have a commodity selection unique to the sixth digit (e.g., 81111800) in order to be in compliance with the Auditor of State. To bid, the offeror must be registered under the identified 6 digit commodity with the Equal Opportunities Division.

- g) Indicate the **Project Start Date**. This will default to the date the project is created, but can be retroactively or future dated if required.
- h) Use the **Market Type** field to indicate the type of Suppliers that will be involved in the solicitation.
- i) If there is a **Request to Purchase** associated with the solicitation, you can search for it and select it from the drop-down menu.
- j) Use the **Confidential Sourcing Project** to hide the sourcing project from users who do not have the appropriate scope (this is only available for DAS Contract Analysts).

3 Click **Save**.

Save

## Step-by-Step Instructions for Creating a Sourcing Project

Once the field entries are completed, click Save. An example of a recently created RFP is below

**4**

**Sourcing General Information**

Solicitation ID  
SRC0000001362 ☒ Confidential Sourcing Project

Label \*  
0A1228 Personal Income Tax System

Project Type: Double Envelope Status \*: In progress

Contracting Entity \*: DAS-Administrative Services Participating Organizations: TAX-Dept of Taxation X

Commodities \*: 43230000 - Software Other Commodities: 81110000 - Computer services X

Project Start Date \*: 8/19/2021

Market Type: Open Request to Purchase:

Index Number:

**Navigation Menu:**

- Setup Team
- Inquiry
- Project Schedule
- Requirements Gathering
- Setup Documents
- Add Suppliers
- Prepare Solicitation
- View Solicitation activity
- Open Technical Envelope
- Open Financial Envelope
- Analyze & Award
- Review Award Results

# MANAGE SOLICITATION TEAM MEMBERS AND ROLES

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
Creating and Preparing Solicitations					
Manage Solicitation Team Members and Roles	✓	✓	✓	✓	✓

---

## Overview

- What's Covered: The process for adding team members to a solicitation in OhioBuys and assigning their roles.
- Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
- Used When: Setting up a solicitation in OhioBuys

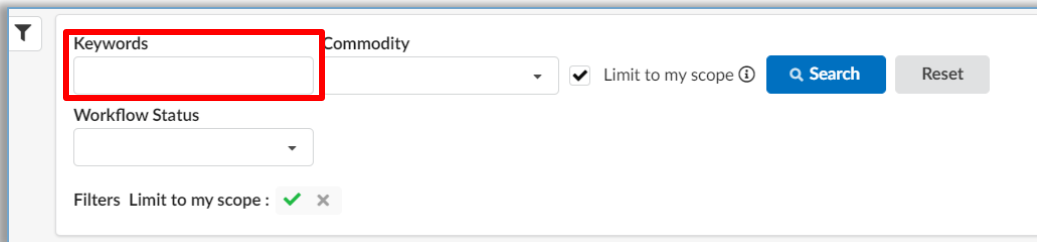
## Step-by-Step Instructions for Managing Solicitation Team Members and Roles


1

Log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

2






The Sourcing Projects page is displayed. On this page, you can enter a variety of search terms to search for your solicitation. Enter search terms in the Keywords search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.



▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, RFx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** (  ) icon.

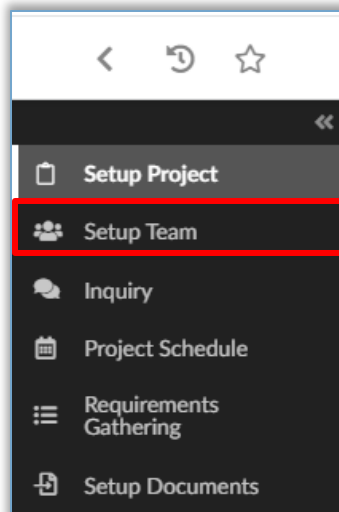
3

Open the sourcing project you would like to edit by clicking the **Pencil** (  ) icon.

Solicitation ID	Sourcing Project Name	Solicitation Type	Workflow Status	Commodity	Contracting Entity	Sourcing Step Shortcuts
 SRC0000008695	MWK Cleaning Services FY24	Double Envelope		Building cleaning services	DPS100000 Directors Office CDSB	   

4

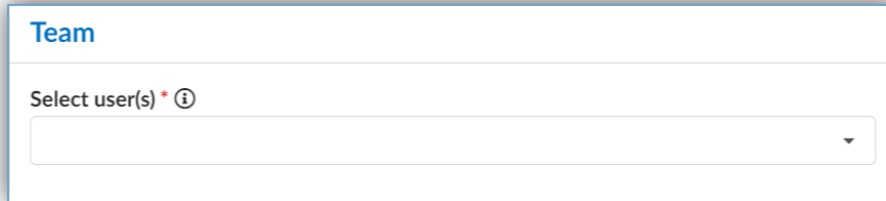
Navigate to the **Setup Team** tab.



## Step-by-Step Instructions for Managing Solicitation Team Members and Roles

5

The **Team** page is displayed. To add a team member, click in the **Select user(s)** field and type in the user's name, then select it when it appears from the drop-down menu.

A screenshot of a web interface titled "Team". Below the title is a label "Select user(s) \* ⓘ" followed by a white rectangular dropdown menu with a small downward arrow on the right side.

6

Select a team member's role under the Profile header. Available roles include:

**a) Ad-hoc Approver (Sourcing Project):** Acts as an additional approver before the Posting Approver when posting a solicitation.

▲ If multiple Ad-hoc Approvers are assigned to the solicitation, all assigned approvers must approve at this step in order to advance to the next step of the workflow.

**b) Contributor (Sourcing Project):** Can update the solicitation with additional information.

**c) Evaluator (Sourcing Project):** Can evaluate Supplier responses to a solicitation.

**d) Posting Approver:** Reviews and approves the solicitation prior to posting.

▲ If assigning a Posting Approver, the **Posting Approval Required** field on the Prepare Solicitation tab must be set to **Yes**

▲ If multiple Posting Approvers are assigned to the solicitation, all assigned approvers must approve at this step in order to advance to the next step of the workflow.

**e) Records Review:** Reviews solicitation documents prior to them being publicly posted, to ensure the proper files are posted (e.g., redacted documents).

**f) SME (Sourcing Project):** Can review and update certain aspects of the solicitation based on their subject matter expertise.

▲ Note: Users can be assigned multiple roles.

▲ To remove a role, click the **X** icon to its left.

▲ To remove a user from the team, click the **Trashcan** (  ) icon to the left of the user's email address.

▲ The user with the Responsible role for the solicitation is required to add all of the necessary approvers to their team.

A screenshot of a table listing team members. The first row shows a trash can icon, the email address "mkaizer@kpmg.com", the name "mkaizer@kpmg.com", a dropdown menu with "Responsible (Sourcing Project)" selected and an "X" icon to its left, and the name "KAIZER Mike".

7

Click **Save**.

A blue rectangular button with the word "Save" in white text.

8

Repeat steps 5-7 to add the remaining team members to the solicitation as needed.

# DEFINE A SOLICITATION PROJECT SCHEDULE

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
Creating and Preparing Solicitations					
Define a Solicitation Project Schedule	✓	✓	✓	✓	✓

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## Overview

- What's Covered: The process for setting up a project schedule on a solicitation in OhioBuys
- Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
- Used When: Setting up a schedule for a solicitation in OhioBuys




## Step-by-Step Instructions for Defining a Solicitation Project Schedule

1

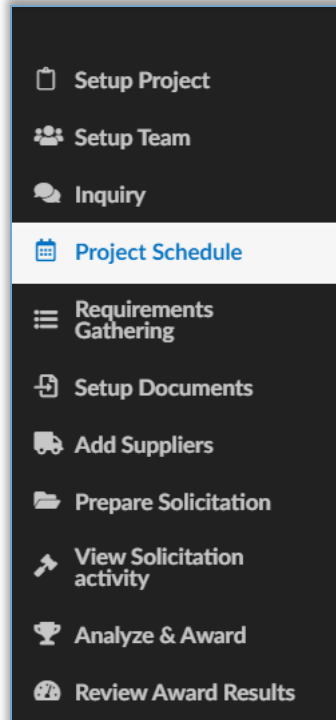
Log in to OhioBuys. From the Main Menu Navigation Bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

2

In the **Keywords** field, search for the solicitation that you would like to edit and select the **Pencil** (  ) icon next to the project.

3

Navigate to the **Project Schedule** tab.



4

▲ Project schedules can be created from schedule templates or ad hoc by adding tasks.

a) To create a schedule from a template, click **Create from a Template Schedule**.

A rectangular button with a light gray background and a thin border. The text 'Create from a Template Schedule' is centered in a dark gray font.

Select the **Checkbox** ( ☐ ) icon next to the solicitation that will be used as a template. Each task from the template will be added to the current solicitation. Refer to step 4c to edit an existing task.

▲ Clicking this button and adding this template will prepopulate your project schedule with a series of milestone tasks that can be subsequently edited and refined.

## Step-by-Step Instructions for Defining a Solicitation Project Schedule

b) To add a new task, click **Add a Task**.

Add a Task

Complete the mandatory fields.

The screenshot shows a form with two main sections: 'Information' and 'Task dates'.

**Information Section:**

- Sourcing Steps:** A dropdown menu.
- Code:** A text field with 'TO' entered.
- Step \*:** A text field.
- Type \*:** A dropdown menu with 'Action' selected.
- Status:** A dropdown menu with 'Scheduled' selected.
- Owner \*:** A dropdown menu with 'BRADLEY Arianna' selected.
- Assigned to \*:** A dropdown menu.
- Description \*:** A text area.
- Parent Task:** A dropdown menu.
- Initial Workload:** A text field.
- Previous Task:** A dropdown menu.
- Real updated load (man-days):** A text field.
- Progress %:** A text field.

**Task dates Section:**

	Begin date	End date	Duration (days)
Initial	Initial Start Date *	Initial end *	Duration
Updated	Revisited Start Date	Updated end date	Revisited Duration
Actual	Actual Start Date	Actual End Date	Duration

Below the task dates section is a **Comment** text area and two buttons: **Click or Drag to add files** and **Save**.

The mandatory fields are:

4

- Step – The name of the task
- Type – The action to be completed as part of this task
- Owner – The user responsible for creating the task
- Assigned To – The user responsible for completing the task
- Description – A detailed description of the task
- Initial Start Date – The date the task is scheduled to begin at the time of its creation
- Initial End – The date the task is scheduled to be completed at the time of its creation

When finished, click **Save & Close** to exist or **Save & New** to save this task and create another.

Save & Close

Save & New

c) To edit an existing task, click the **Pencil (✎)** icon next to the task. Update the information within the fields as needed and click **Save & Close**.

- ▲ After you have added tasks to your project schedule, you can update progress on the Project Schedule tab by clicking on the Pencil icon for the task you wish to update. Once you have made your updates, click the Save & Close button. All tasks assigned to users will be available on the My Open Scheduled Tasks page.

# GATHER REQUIREMENTS FOR A SOLICITATION

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
Creating and Preparing Solicitations					
Gather Requirements for a Solicitation	✓	✓	✓	✓	✓

---

## Overview


- What's Covered: The process for gathering requirements for a solicitation within OhioBuys
- Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
- Used When: Defining the requirements to fulfill a need using a solicitation in OhioBuys. Please note this process is optional in OhioBuys

## Step-by-Step Instructions for Gathering Requirements for a Solicitation

1

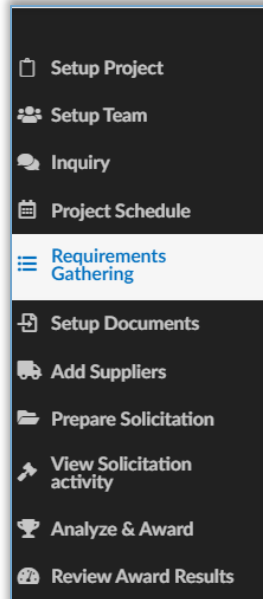
Log into OhioBuys. From the main menu navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

2

In the **Keywords** field, search for the solicitation that you would like to edit and select the **Pencil** (  ) icon next to the project.

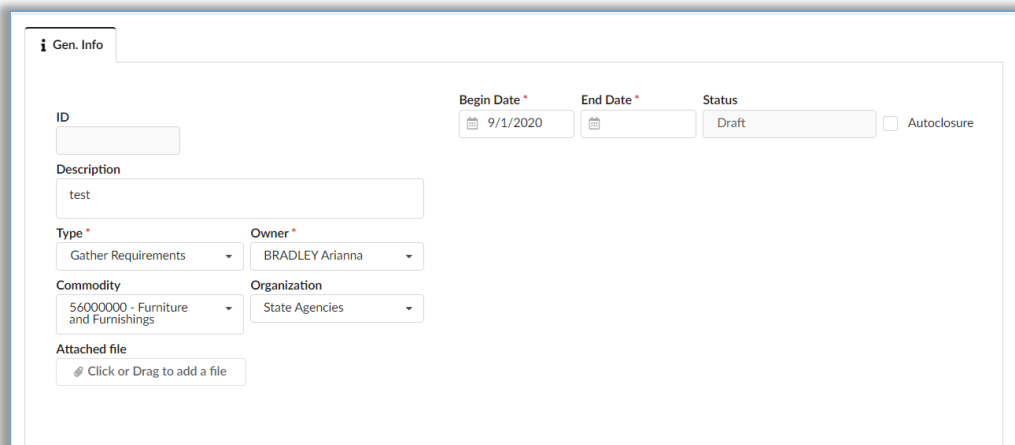
3

Navigate to the **Requirements Gathering** tab.



4

Enter the begin and end dates for the assessments. These are the dates in which you would like the assessment questionnaires to be completed within. You can also check the Autoclosure checkbox if you would like the assessment to automatically close the responses on the end date.

A screenshot of a web form titled 'Gen. Info'. The form contains several fields: 'ID' (text input), 'Begin Date' (calendar icon, value: 9/1/2020), 'End Date' (calendar icon, empty), 'Status' (dropdown menu, value: Draft), and 'Autoclosure' (checkbox, unchecked). Below these are 'Description' (text input, value: test), 'Type' (dropdown menu, value: Gather Requirements), 'Owner' (dropdown menu, value: BRADLEY Arianna), 'Commodity' (dropdown menu, value: 56000000 - Furniture and Furnishings), and 'Organization' (dropdown menu, value: State Agencies). At the bottom is an 'Attached file' section with a button that says 'Click or Drag to add a file'.

When you are finished, click **Save**.

A blue rectangular button with the word 'Save' in white text.

## Step-by-Step Instructions for Gathering Requirements for a Solicitation

Navigate to the **Questionnaire** tab that appears.

5

Save & Close Save Submit Cancel Promote to template

Gen. Info **Questionnaire** Answers Workflow Comparison

**Questionnaire Summary** Actions

Total Questionnaire Sections	0	<a href="#">Edit Questions</a>
Total Questionnaire Questions	0	

[Preview As Respondent](#)

Click **Edit Questions**.

Edit Questions

The **Questionnaire Builder** is displayed.

Questionnaire Builder

Questionnaire Respondents

Find a question... Display Question Options

No sections or questions added. Add a new section to begin adding questions or import data from excel or an existing template.

The Questionnaire Builder is divided into a **Questionnaire** tab and a **Respondents** tab:

6

Questionnaire Builder

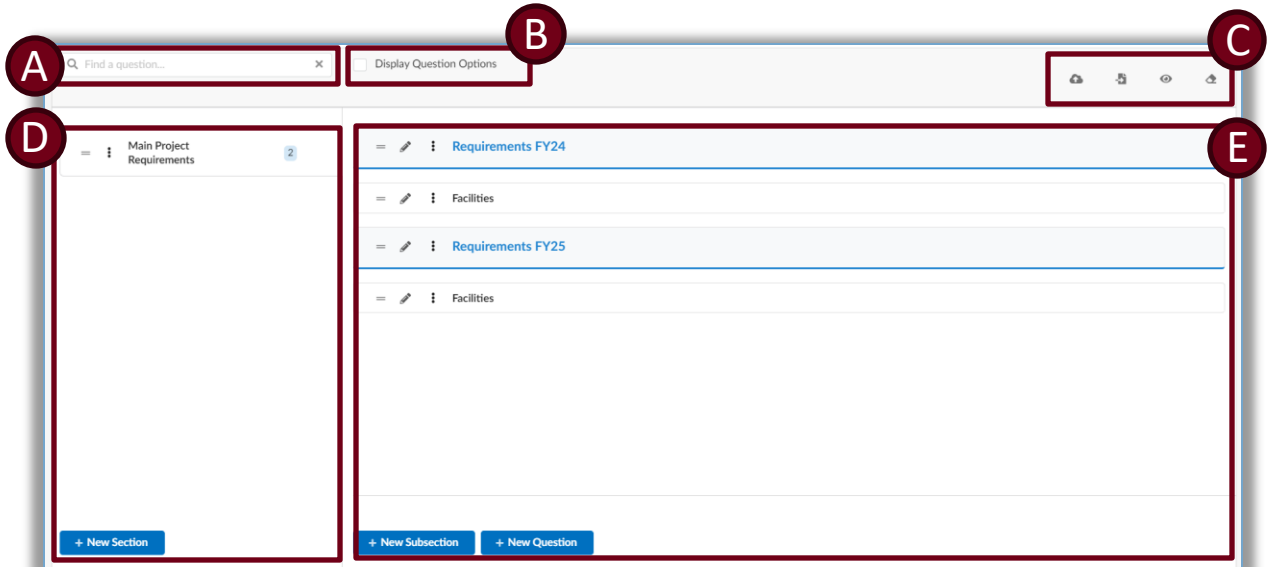
Questionnaire Respondents

Find a question... Display Question Options

- The **Questionnaire** tab is where users will build the requirements questionnaire, either by manually adding sections and questions, or by importing a requirements questionnaire template.
- The **Respondents** tab is where users will indicate who should be responsible for completing and evaluating the requirements questionnaire once it is complete.

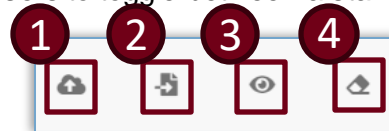
## Step-by-Step Instructions for Gathering Requirements for a Solicitation

On the **Questionnaire** tab, users have a variety of options to input and navigate questions.



- a) The **Search Bar** can be used to search within the content of questions in the questionnaire.
- b) The **Display Question Options** checkbox allows users to toggle between a standard, and more detailed view of the questionnaire.

- c) There are 4 **Quick Action Buttons**:



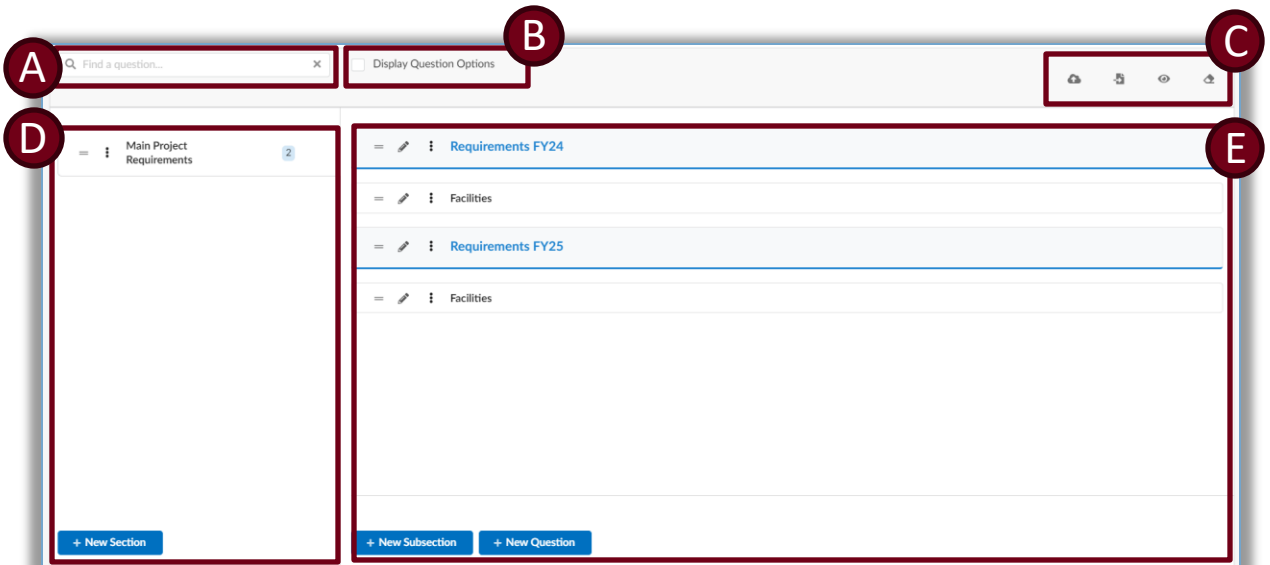
1. The **Import/Export Excel** (☁️) button allows users to either import previously exported requirements questionnaires that have been saved as Excel files, or to export the current questionnaire into an Excel file.
2. The **Import Existing Template** (📄) button allows users to import previously saved requirements questionnaire templates housed within OhioBuys.
3. The **Preview** (👁️) button allows users to view what the requirements questionnaire will look like to a respondent.
4. The **Clear All** (🗑️) button allows users to remove all questions currently in the requirements questionnaire.

- d) The questionnaire **Sections** are displayed on the left side of the screen. Users can use the **New Section** button to create a new section.

+ New Section

- ▲ Users must create a section prior to adding questions or subsections to a questionnaire.
- ▲ Existing sections can be reordered by clicking, and dragging the **Order** (=) icon.
- ▲ Clicking the **More Options** (⋮) icon allows users to edit, duplicate, or delete a section.

## Step-by-Step Instructions for Gathering Requirements for a Solicitation



7

- e) The questionnaire **Subsections** and **Questions** are displayed on the right side of the screen. Users can use the **+ New Subsection** button to add a new subsection, and the **+New Question** button to add a new question.

+ New Subsection

+ New Question

- ▲ Note that subsections are **not** required to add questions to the questionnaire.
- ▲ Questions will appear within the subsection that they are immediately below (i.e., if a question is listed higher than and subsection, that question will appear outside of any subsection).
- ▲ Existing subsections and questions can be reordered by clicking, and dragging the **Order** (=) icon.
- ▲ Questions and subsections can be opened and edited by clicking the **Pencil** (✎) icon.
- ▲ Clicking the **More Options** (⋮) icon allows users to duplicate, move, or delete a question or subsection.

8

Click **+ New Section** to create a new questionnaire section.

+ New Section

## Step-by-Step Instructions for Gathering Requirements for a Solicitation

9

← Previous | Save | Save & Close | Cancel | Save & New →

**Questionnaire Element**

Questionnaire element

Code

**Section\***

Label

Description / Instructional Text

Description / Hints

☒ Several respondents allowed

Complete the **Section** field which will serve as the name for this section. Users can also optionally complete the **Description / Instructional Text** field to add additional context or instruction to the header of the section.

When you are finished, click **Save & Close** to return to the Questionnaire Builder, or click **Save & New** if you want to add additional sections.

[Save & Close](#)

10

To add subsections, repeat the process in steps 8 and 9, only begin by clicking **+ New Subsection** rather than **+ New Section**.

[+ New Subsection](#)

11

Click **+ New Question** to add a new question.

[+ New Question](#)



## Step-by-Step Instructions for Gathering Requirements for a Solicitation

The **Questionnaire Element** page is displayed. Complete the mandatory fields, including the **Field Label** (i.e., the name of the field) and the **Answer Type**.

The different Answer Types available are listed below:

12

- **Text:** This answer type allows the respondent to type the response into the questionnaire without restrictions on the type of characters that are used (i.e. letters, numbers, symbols).
- **Long Text:** Similar to Text, this answer type allows all character types in the response. The character limit for Long Text questions is significantly longer than for Text and should be utilized for in-depth responses.
- **Numeric:** This answer type will only allow numeric characters without symbols such as periods, commas, or dashes
- **Date:** This answer type will only allow answers in the date format. When the respondent clicks inside the field, they will be able to select a date from a calendar.
- **Attachment (Single File):** This answer type allows the respondent to attach one file to the questionnaire.
- **Attachments (Multiple Files):** This answer type allows the respondent to attach multiple files to the questionnaire.
- **List of values:** This answer type allows the sourcing responsible to restrict the respondent's answer to a list of values.
- **Selector:** This answer type allows the user responsible for the solicitation to restrict the respondent's answer to a list of values. The list must already exist in OhioBuys. (e.g., country, state) To make your own list, please use List of Values.
- **Supplier Document:** This answer type requires that the user indicate which Supplier Document Type they want the respondent(s) to upload. These documents can be quickly applied to a Supplier's record in OhioBuys directly from within the solicitation (e.g., if a user uploads a Supplier's license to do business)

## Step-by-Step Instructions for Gathering Requirements for a Solicitation

13

The **Advanced Properties** section allows users to indicate if multiple answers are allowed for a single question, if a question is required, if additional comments can be added to clarify an answer, and/or if a respondent can add an attachment to their answer.

Advanced Properties

Mapped with the field

☐ Multiples answers allowed  
☐ Required  
☐ Add Comment Field to Clarify the Answer  
☐ Add an Attachment to Answer

14

The **Conditional Constraints** section allows the user responsible for the solicitation to create rules for the questionnaire. For example, answers to a question can be limited based on how the respondent has answered a prior question. All of the rules use “if/then” statements. (e.g., If [Q1] “Does your organization have experience with this process?” is equal to NO, then [Q2] “Please provide your additional qualifications.” Is mandatory.)

Constraints on this field based on another field

+

Question	Rules *	Value *	Result	Constraint type *
<div>if</div> <div> <div>Question</div> <div>Facilities</div> </div>	is equal to		then [Q6]	is visible
0 Record(s)				

Constraints based on the value of this field

+

Question	Rules *	Value *	Result	Constraint type *
0 Record(s)				

## Step-by-Step Instructions for Gathering Requirements for a Solicitation

15

When finished editing the question details, click **Save & Close**.



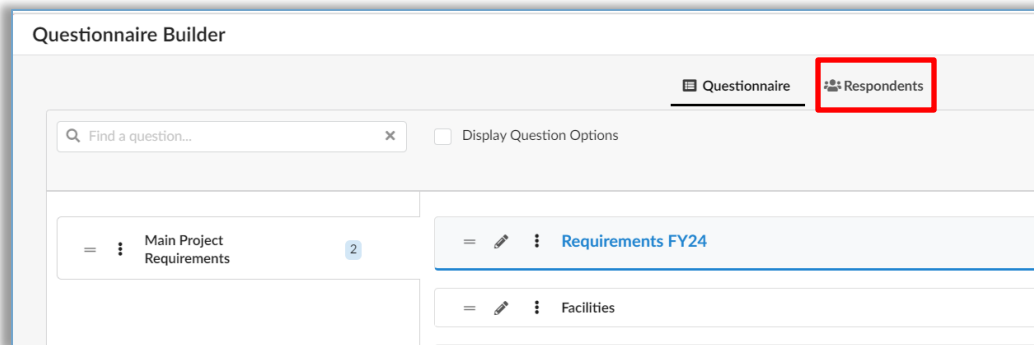
16

Repeat steps 6-11 to add more questions. When the requirements questionnaire is complete, click the **Preview** Quick Action Button to see what the requirements questionnaire will look like from the respondent's perspective.



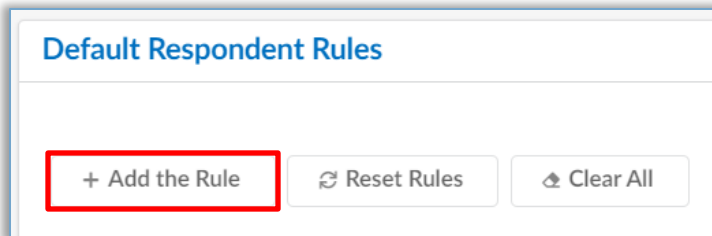
17

To assign respondents to complete the requirements questionnaire, navigate to the **Respondents** tab.



18

To add a rule regarding how the requirements questionnaire will be evaluated, click **+ Add the Rule**.



▲ **Reset Rules** can be used to revert respondent rules after they have been added

▲ **Clear All** can be used to delete any respondent rules that have been created

## Step-by-Step Instructions for Gathering Requirements for a Solicitation

## Add New Respondent Rule

The User: \*

select user...

Or Role: \*

select role...

Will answer:

all sections/subsections

Save

Cancel

- a) Indicate the specific user(s) or member(s) of the project team in either the **The User** field, or the **Or Role** field.
- b) In the **Will answer** field, select one, multiple, or all sections that the respondent needs to complete. Note that if this field is left blank, the respondent will be assigned to complete all sections/subsections
- ▲ If the questionnaire is being assigned to users with a specific role or local profile, the respondents must be added to the Setup Team prior to releasing the questionnaire.

After selecting the appropriate values, click **Save**.

Save

- ▲ Users can also individually assign respondents to specific sections and subsections in the **Respondents Assigned** table below by typing the user(s) name(s) in the **Respondents** field.

**Respondents Assigned**

Keywords  Select Team Members  ☐ Missing evaluators ☐ Manual Changes

Type	Section	Respondents
Sub Section	Requirements FY24	KAIZER Michael
Sub Section	Requirements FY25	KAIZER Michael

2 Record(s)


Click the **X** icon in the top right corner to close the Questionnaire Builder. Then click **Save**.

Save

## Step-by-Step Instructions for Gathering Requirements for a Solicitation

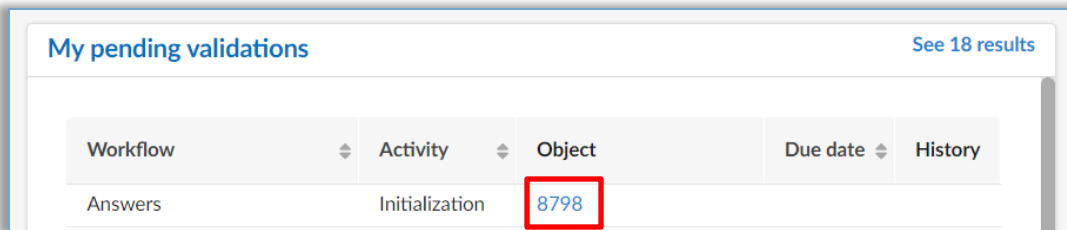
21

Click **Submit** to release the requirements questionnaire.



22

The user(s) responsible for completing the requirements gathering questionnaire will receive a notification in the **My Pending Validations** section of their homepage. If assigned a requirements gathering questionnaire, click the **Object Hyperlink** in the notification to open it.

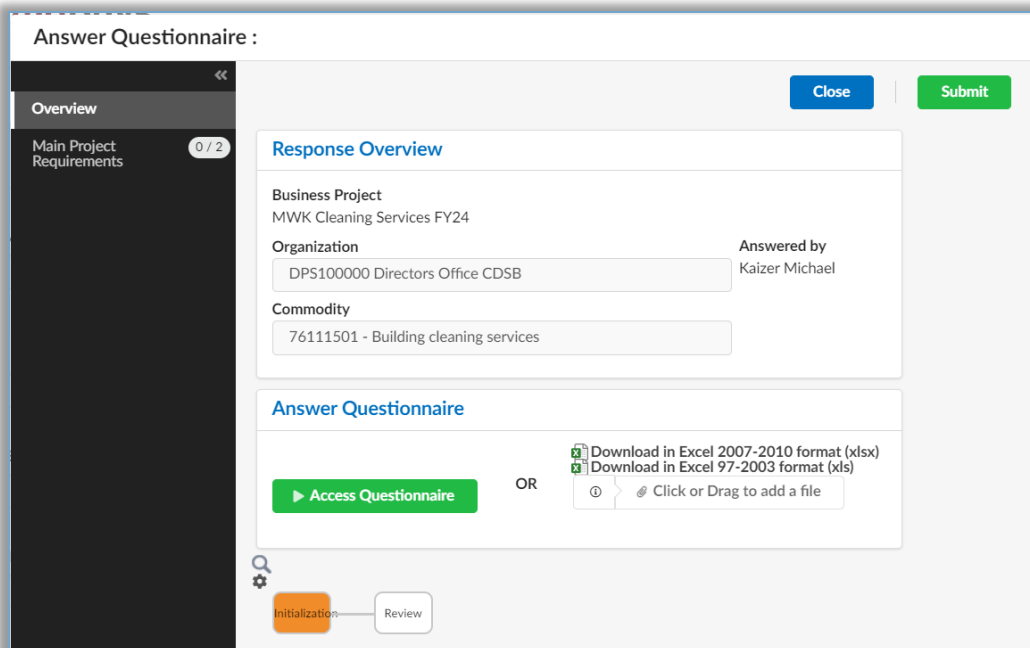


The screenshot shows a table titled "My pending validations" with a link "See 18 results" in the top right. The table has five columns: Workflow, Activity, Object, Due date, and History. The first row of data shows "Answers" under Workflow, "Initialization" under Activity, and "8798" under Object, which is highlighted with a red box.

Workflow	Activity	Object	Due date	History
Answers	Initialization	8798		

23

The requirements questionnaire is displayed. Users should scroll down and complete the questions as appropriate.



The screenshot shows the "Answer Questionnaire" interface. On the left is a sidebar with "Overview" and "Main Project Requirements" (0/2). The main area has a "Response Overview" section with fields for "Business Project" (MWK Cleaning Services FY24), "Organization" (DPS100000 Directors Office CDSB), "Commodity" (76111501 - Building cleaning services), and "Answered by" (Kaizer Michael). Below this is the "Answer Questionnaire" section with a green "Access Questionnaire" button, download links for Excel 2007-2010 and Excel 97-2003 formats, and a "Click or Drag to add a file" button. At the bottom, there's a progress bar with "Initialization" and "Review" steps.

▲ Questionnaires can be downloaded in Excel format by clicking **Download in Excel** on the Overview tab. If a user chooses to complete the questionnaire in Excel format, they should reupload the completed document by using the **Click or Drag to Add a file** button.

24

When users are finished completing the requirements questionnaire click **Submit**.



## Step-by-Step Instructions for Gathering Requirements for a Solicitation

25

After a respondent completes the requirements questionnaire, it will appear in the user responsible for the solicitation's **Pending Validations**. Log in to OhioBuys. In the Main Menu Navigation Bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

Navigate to the **Requirements Gathering** tab and select the **Answers** tab.

26

Sourcing project: SRC0000008695 - MWK Cleaning Services FY24 - Requirements Gathering

Save & Close Save

Gen. Info Questionnaire **Answers** Workflow Comparison

Keywords Respondent Business Project Status

MWK Cleaning Services FY24

0 Selected Send Reminder

Questionnaire	Respondent	Progress	Status
<input type="checkbox"/>	Kaizer Michael	0%	In progress
<input type="checkbox"/>	Kaizer Michael	100%	Approved

2 Record(s)

To open a respondent's answers, click the **Pencil** (✎) icon next to their name.

Once all respondents have completed the questionnaire, click **Close Evaluation**.

[Close Evaluation](#)

27

Review the respondents' answers. If edits or clarifications are needed, click **Re-open the campaign**.

[Re-open the campaign](#)

Users can then make any necessary updates or edits to the questionnaire before clicking **Submit** to send it back to respondents.

[Submit](#)

# UPLOAD AND MANAGE SOLICITATION DOCUMENTS

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
Creating and Preparing Solicitations					
Upload and Manage Solicitation Documents	✓	✓	✓	✓	✓

---

## Overview

- What's Covered: The process for uploading and managing documents for a solicitation in OhioBuys
- Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
- Used When: Setting up a solicitation in OhioBuys

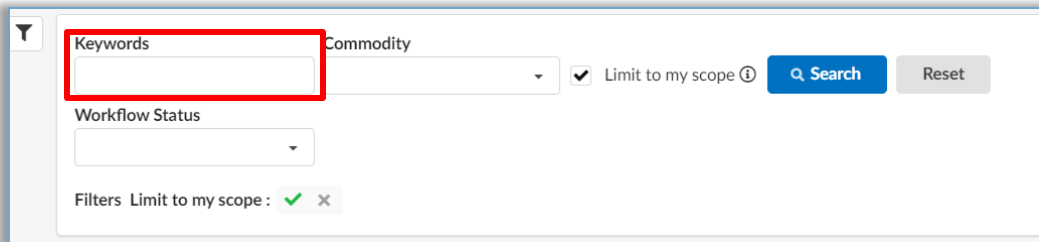
## Step-by-Step Instructions for Uploading and Managing Solicitation Documents

1

Log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

2

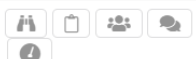
The Sourcing Projects page is displayed. On this page, you can enter search terms to locate your solicitation. Enter search terms in the Keywords search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.



▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, RFx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** (⌵) icon.

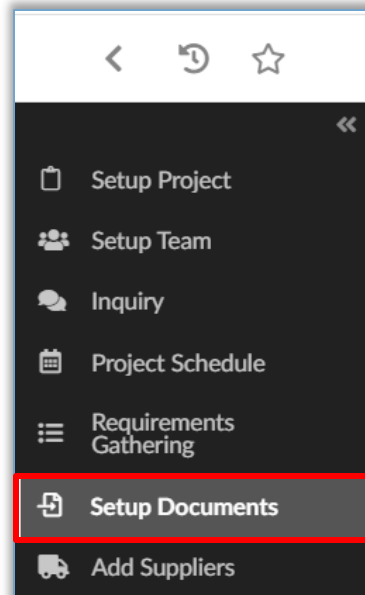
3

Open the sourcing project you would like to edit by clicking the **Pencil** (✎) icon.

Solicitation ID	Sourcing Project Name	Solicitation Type	Workflow Status	Commodity	Contracting Entity	Sourcing Step Shortcuts
✎ SRC0000000814	MWK Sourcing Project Test	Triple Envelope		• Livestock		

4

Navigate to the **Setup Documents** tab.





## Step-by-Step Instructions for Uploading and Managing Solicitation Documents

5

In the **General Documents** section, certain State Documents that are standard across solicitations are displayed. To export these documents to a .zip file, click the **Checkbox** (☐) icon to the left of the documents you would like to export. Then click **Zip Selected Documents**.

<input type="checkbox"/>	Title	Contact	Last Modification (UTC-4)	Creation Date (UTC-4)	Validity End Date	Version
<input type="checkbox"/>	Independent Contractor Acknowledgment Form	ROBINSON WEB	6/23/2020 6:35:48 PM	6/23/2020 6:35:48 PM		
<input type="checkbox"/>	Affirmation and Disclosure Form	ROBINSON WEB	6/23/2020 6:23:43 PM	6/23/2020 6:23:43 PM		
<input type="checkbox"/>	State Terms and Conditions	ADMIN Clarity	6/30/2020 1:23:41 PM	6/17/2014 5:51:57 PM		

0 Result(s)

• Note: This is NOT where RFP documents for the general public (e.g., Main RFP document, Supplement 1) are uploaded.

6

**Sourcing Project Documents** is a repository where RFP review approvals (e.g., from Legal or OIT) and other confidential documents can be stored. To add a document, click Create Document.

▼ Sourcing Project Documents ⓘ

Create Document

0 Result(s)

Select a document type from the list provided.

Select a document type

- Confidential Documents
- Evaluation Documents
- Internal Project Documents
- Pre-Solicitation Assessment Documents
- Public Evaluations Documents
- Public Proposals
- Public Solicitation Documents

Document types include:

7

- 1) **Confidential Documents** – Documents associated with the solicitation that bear some level of confidentiality
- 2) **Evaluation Documents** – Documents relevant to how proposals will be evaluated
- 3) **Internal Project Documents** – A catchall for all other relevant internal documents associated with the solicitation
- 4) **Pre-Solicitation Assessment Documents** – Documents relevant to the need. This might include a project intake form, risk assessment, data assessment, etc.
- 5) **Public Proposals** – Responses to the solicitation that are publicly available – note that these will not be available until after responses have been received
- 6) **Public Solicitation Documents** – Relevant solicitation documents that are released to the public

▲ Note that the Public document types on this tab will only be made publicly available after the solicitation has been awarded and there is a signed contract associated with it. In order to make documents visible to responding Suppliers please make sure that they are included on Documents header of the **Prepare Solicitation** tab.

## Step-by-Step Instructions for Uploading and Managing Solicitation Documents

8

Update the document information by including:

The screenshot shows a web form with two main sections: 'Title' and 'Information'. The 'Title' section has a text input field labeled 'Title \*' and a 'Summary' link with a help icon. The 'Information' section has a 'Status' dropdown menu currently set to 'Approved', a button that says 'Click or Drag to add files', and a 'Sourcing Project' section with a button labeled 'MWK Sourcing Project Test'.

- a) **Title:** The name of the document.
- b) **Summary:** A description of the document contents.
- c) **Status:** Whether the document has been approved, drafted, blocked, or requires approval.

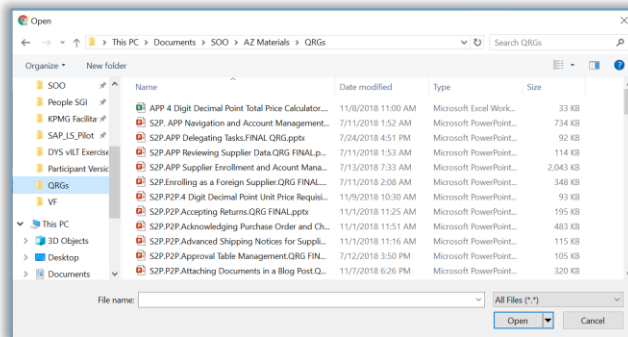
9

Click **Click or Drag to add files** to upload a document.

A rectangular button with a light blue border and a light blue background. It contains the text 'Click or Drag to add files' in a small, dark blue font.

10

Select a document from your PC and click **Open** to upload it.



11

Click **Save & Close** to upload the document.



A blue rectangular button with a white border. It contains the text 'Save & Close' in white, bold, sans-serif font.

## Step-by-Step Instructions for Uploading and Managing Solicitation Documents

To manage a document once it has been uploaded:

<input type="checkbox"/>	Title	Type	Contact	Last Modification (UTC-4)	Creation Date (UTC-4)	Validity End Date	Version
<input type="checkbox"/>	MWK Dummy Doc	Evaluation Documents (Approved)	KAIZER Mike	8/14/2020 3:21:51 PM	8/14/2020 3:14:59 PM		
1 Result(s)							

12

- Click the **Pencil** (  ) icon to edit the document information.
- Click the **Trashcan** (  ) icon to delete the document.
- Click the **Checkbox** ( ☐ ) icon to select a document, then click **Zip Selected Documents** to export them to a .zip file.

13

Repeat steps 6-12 as needed until you are finished uploading solicitation documents. When you are finished, click **Save & Close**.

[Save & Close](#)

# COMPLETE THE PREPARE A SOLICITATION TAB

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
Creating and Preparing Solicitations					
Complete the Prepare a Solicitation Tab	✓	✓	✓	✓	✓

---

## Overview

- What's Covered: The process for completing the Prepare Solicitation tab of a solicitation in OhioBuys
- Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
- Used When: Setting up a solicitation in OhioBuys

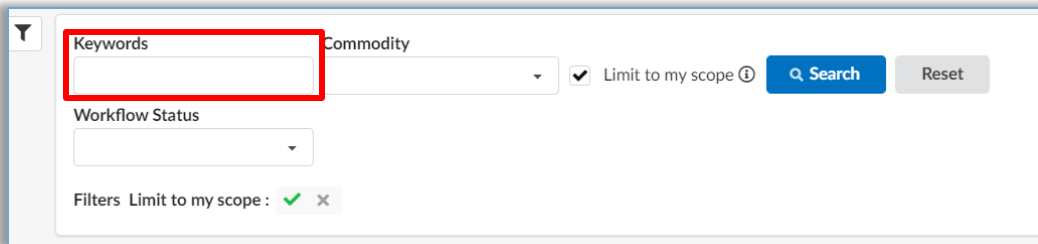
## Step-by-Step Instructions for Completing the Prepare a Solicitation Tab

1

Log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

2


The Sourcing Projects page is displayed. On this page, you can enter search terms to locate your solicitation. Enter search terms in the Keywords search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.



▲ You can also search for projects based on a variety of filters including Commodity, Workflow Status, Contact, Supplier, Contracting Entity, Participating Organizations, Index, RFx Type, Solicitation Status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** (🔍) icon.

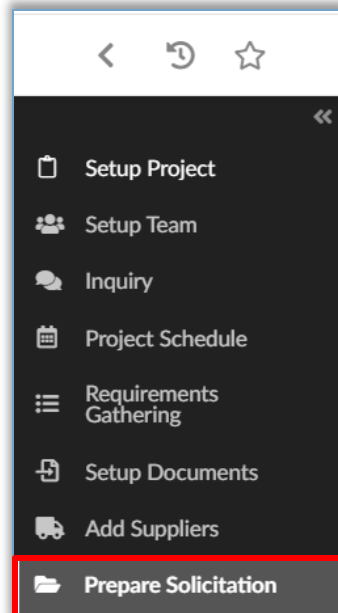
3

Open the sourcing project you would like to edit by clicking the **Pencil** (✎) icon.

Solicitation ID	Sourcing Project Name	Solicitation Type	Workflow Status	Commodity	Contracting Entity	Sourcing Step Shortcuts
✎ SRC0000000814	MWK Sourcing Project Test	Triple Envelope		• Livestock		

4

Navigate to the **Prepare Solicitation** tab.



## Step-by-Step Instructions for Completing the Prepare a Solicitation Tab

On the **Prepare Solicitation** tab:

The screenshot displays the 'Prepare Solicitation' tab interface. It is divided into several sections:

- RFx Settings:** Includes fields for Status (Draft), Save as a template, Workflow Status (Draft), RFx Type (Invitation To Bid (ITB)), Solicitation Name (MWK Solicitation LG), Lot # (1), Round # (1), Amendment? (No), and Posting Approval Required? (No).
- Open and Closure:** Includes Begin Date (10/14/2020 12:00:00 AM), Closing Date (10/21/2020 12:00:00 AM), and a checkbox for 'Close automatically'.
- Inquiry Period:** Includes Inquiry Begin Date (12:00:00 AM) and Inquiry End Date (12:00:00 AM).
- Enable for Public Posting:** Includes Publication Begin Date (10/14/2020 12:00:00 AM) and Publication End Date (10/21/2020 12:00:00 AM).
- Process:** A text input field.
- Summary:** A text input field.
- Commodity Suppliers:** Includes a 'Suppliers Notified' checkbox (Yes/No).
- Advanced Options:** A section with checkboxes for: Suppliers must sign a Non Disclosure Agreement, Publicly Post Opportunity, Scaled bids, Require suppliers to respond to RFx invitation, The RFx must have at least one grid with an item, Check the presence of a total column grid, Suppliers answer in a form, not in a grid, and Suppliers can partially bid.

- a) Select the **RFx Type** from the drop-down menu – the available RFx types will vary depending on the type of sourcing project you selected. RFx types include:
  - 1) RFI: Request for Information, aimed at obtaining information about the capabilities and offerings of various Suppliers. An RFI is similar to an RFQ/RFP in structure but a supplier can not be awarded in OhioBuys whereas an RFQ/RFP can.
  - 2) RFQ: Request for Quote, aimed at getting a quote from Suppliers. An RFQ can be awarded in OhioBuys based on the quotes that are received from a list of invited suppliers for a specific solicitation and evaluation criteria defined by state users.
  - 3) ITB: Invitation to Bid, aimed at obtaining responses from invited Suppliers
  - 4) RFP: Request for Proposal, aimed at obtaining responses from Suppliers for specific statements of work or specifications
  - 5) IFP (DAS only): Invitation for Proposal, aimed at obtaining responses from pre-qualified Suppliers for specific statements of work or specifications
  - 6) Quick Quote: A simple solicitation for a specific need
  - 7) Public Notice: Notice of a solicitation process occurring outside of OhioBuys
  - 8) Reverse Auction (DAS only): A means of awarding a single envelope solicitation via an auction process
- b) If needed, update the **Solicitation Name**. At a bare minimum, this field should include a description of the solicitation that will be understandable to Bidders and/or Suppliers unfamiliar with the State. Always spell out agency names and division/office/bureaus.
- c) Indicate whether or not the solicitation is an **Amendment**.
- d) Indicate the **Open and Closure** dates. These are the dates the solicitation will be available for Suppliers to respond to. Solicitation end dates/times must be during business hours so that issues can be resolved before bids are due.

## Step-by-Step Instructions for Completing the Prepare a Solicitation Tab

On the **Prepare Solicitation** tab:

The screenshot displays the 'Prepare Solicitation' tab interface. It includes sections for 'RFx Settings' (Status, Workflow Status, RFx Type, Solicitation Name, Lot #, Round #, Amendment?, Posting Approval Required?), 'Open and Closure' (Begin Date, Closing Date, Close automatically), 'Inquiry Period' (Inquiry Begin Date, Inquiry End Date), 'Enable for Public Posting' (Publication Begin Date, Publication End Date), and 'Process' (a text area for the selection process). There are also checkboxes for 'Suppliers Notified' and 'Advanced Options'.

e) Indicate the **Inquiry Period** – these are the dates during which Suppliers can ask questions about the details of the solicitation. Inquiry Period end dates/times must be during business hours so that issues can be resolved before bids are due.

5

- ▲ If the Inquiry Begin Date is not populated by the user, it will automatically match the solicitation posting date once the solicitation is open for bidding. However, users must always manually input the Inquiry End Date.
  - ▲ The attachment function for replying to inquiries is not enabled. All relevant details and documentation should be provided in the comments section
- f) Indicate the **Enable for Public Posting** dates – these are the dates during which the solicitation will be available for viewing on the public portal. If not populated by the user, the Publication Begin Date will automatically populate to match the Begin Date of the solicitation, and Publication End Date will automatically populate with a date one year after the solicitation closing date.
- g) Complete the **Process** section to provide a general overview of the selection process that will be used to award the solicitation. It is important to complete this field with as much detail as possible to keep Suppliers effectively informed about the selection process. (e.g., for a Public Notice solicitation, provide instructions on where responses should be submitted since they will be submitted outside of OhioBuys; for a bid/quote, explain that an award will be made to the lowest responsive and responsible Bidder and/or Supplier)

## Step-by-Step Instructions for Completing the Prepare a Solicitation Tab

On the **Prepare Solicitation** tab:

The screenshot displays the 'Prepare Solicitation' tab interface. It includes sections for 'RFx Settings' (Status, Workflow Status, RFx Type, Solicitation Name, MWR Solicitation LG, Lot #, Round #, Amendment?, Posting Approval Required?), 'Open and Closure' (Begin Date, Closing Date, Close automatically), 'Inquiry Period' (Inquiry Begin Date, Inquiry End Date), 'Enable for Public Posting' (Publication Begin Date, Publication End Date), 'Process', and 'Summary'. The 'Advanced Options' section is expanded, showing checkboxes for various requirements like Non Disclosure Agreement, Publicly Post Opportunity, Scaled bids, and others.

5

- g) Complete the **Summary** section to introduce and provide a general overview of the purpose for the request. It is important to complete this field with a straightforward explanation of what goods/services the solicitation is for, to provide Bidders and/or Suppliers with a high-level understanding of what is being sought, when the goods/services will be needed, method of payment, and the ship-to address (this helps suppliers in factoring shipping costs into their proposal, as opposed to the issue potentially arising when a PO is issued)
- ▲ If the solicitation has been created from a purchase requisition, the contents of the Request Description field will automatically populate in the Summary field. This field can be edited as appropriate.
  - ▲ In order to ensure all documents uploaded by Suppliers can be pulled into the contract record automatically, it is recommended that users instruct Suppliers to upload a copy of **all** documents submitted as part of their response to their response header. These instructions can be captured in the **Summary** section.
  - ▲ Always spell out agency names and division/office/bureaus.



## Step-by-Step Instructions for Completing the Prepare a Solicitation Tab

In the **Advanced Options** section you can indicate a number of additional pieces of information about the solicitation. Note that the advanced options that are available will vary depending on the type of RFx that is being conducted.

Advanced Options

- ☒ Publicly Post Opportunity
- ☒ Sealed bids
- ☒ Require suppliers to respond to RFx invitation
- ☒ The RFx must have at least one grid with an item
- ☒ Check the presence of a total column grid
- ☐ Suppliers answer in a form, not in a grid
- ☐ Suppliers can partially bid
- ☐ Reopen supplier proposals
- ☐ Buyers can create early contract documents

- 1) **Publicly Post Opportunity** – Posts the solicitation to the public portal. Be sure to uncheck this option when seeking clarifications from a Bidder or Supplier who has already submitted a response as a part of a new lot.
  - ▲ If the Publicly Post Opportunity checkbox is disengaged, please also update the **Notify Commodity Suppliers** selector to **No**.
  - ▲ While checked by default, the Publicly Post Opportunity checkbox can be disengaged for all Triple Envelope solicitations. Note: this is not checked by default for IFP solicitations.
- 2) **Sealed Bids** – Responses from Bidders and/or Suppliers are sealed and must be individually opened.
  - ▲ After clicking **Begin Evaluation** once the bidding period has closed, users will need to click the Padlock to unseal the bids. For more information, please review [Open Solicitation Responses](#).
- 3) **Require Suppliers to respond to RFx invitation** – Suppliers must indicate their intent to participate – Moving forward, State users no longer have the ability to input responses on behalf of Bidders and/or Suppliers (i.e., Bidders and/or Suppliers must submit their own responses in OhioBuys).
- 4) **The RFx must have at least one grid with an item** – Uncheck this box only if the solicitation will contain no items (e.g., using a specialized item sheet stored in Excel).
  - ▲ This checkbox is only available for the following RFx types: IFP, ITB, RFI, RFP, RFQ
  - ▲ This checkbox is unchecked automatically for all solicitations with the IFP RFx type
- 5) **Check the presence of a total column grid** – Confirms that the Item Grid contains all of the necessary columns.
- 6) **Suppliers answer in a form, not in a grid** – Requires Suppliers to respond in a written form rather than completing an item grid.
- 7) **Suppliers can partially bid** – Allows Suppliers to submit responses for some, but not all items in the item grid.
- 8) **Reopen supplier proposals** – Allows users to reopen Supplier proposals without issuing a new lot or round. For more information, please refer to Reopen Supplier Proposals
- 9) **Buyers can create early contract documents** – Allows users to begin the contract negotiation process by incorporating Early Contract Documents. (i.e., documents that can be authored by internal users within OhioBuys as part of a sourcing project)

## Step-by-Step Instructions for Completing the Prepare a Solicitation Tab

- ▲ When a solicitation's responses are unsealed, the **Previously sealed before the solicitation Closing Date** checkbox will be engaged as shown in the screenshot below.

Advanced Options

- ☐ Buyers can acknowledge receipt of bids
- ☐ Adding Offline Response
- ☒ Publicly Post Opportunity
- ☐ Sealed bids
- ☒ Require suppliers to respond to RFx invitation
- ☒ Check the presence of a total column grid
- ☐ Suppliers can partially bid
- ☒ Previously sealed before the solicitation Closing Date

- ▲ When this checkbox is engaged, users are able to see which user previously unsealed the bids on the **Workflow** tab.

Setup Items Confirm Invited Suppliers Documents **Workflow**

RFx Settings

Solicitation Status: Closed

Workflow Status: Closed

☐ Save as a template

- ▲ Beneath the workflow, users will find a table outlining which user was responsible for previously unsealing the bids.

Add a comment

Comment

Send to

Click or Drag to add files

Save

**Sealed Bid Opening Information**

Opened By	Login	Unsealed Date/Time
Marla Phipps	10054515	Aug 25 2021 2:58:39:240PM

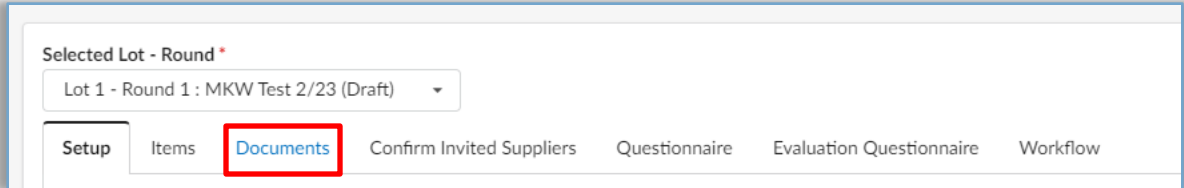
1 Result(s)

## Step-by-Step Instructions for Completing the Prepare a Solicitation Tab

6

Click **Save**.
 Save

7

Navigate to the Documents header on the **Prepare Solicitation** tab.


Selected Lot - Round \*

Lot 1 - Round 1 : MKW Test 2/23 (Draft)

Setup Items **Documents** Confirm Invited Suppliers Questionnaire Evaluation Questionnaire Workflow

Indicate which documents should appear on the RFX.

Create a Document

Attach Existing Document

8

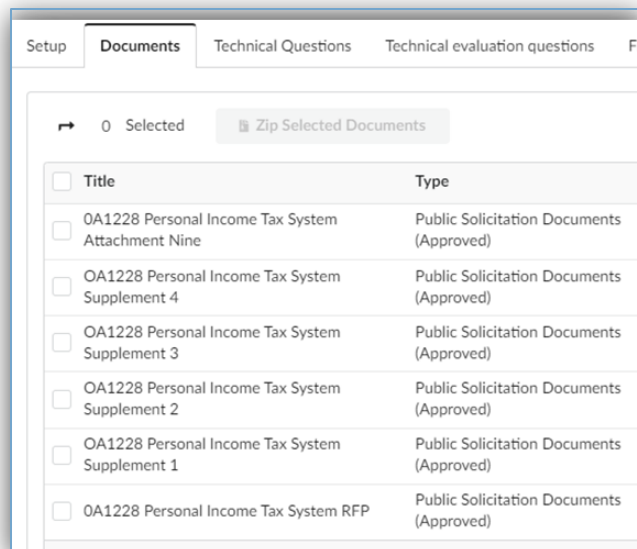
a) Click **Create a Document** to upload a document that does not exist in the Setup Documents tab. You will be asked to select a document type. The process for doing this is the same process covered in the Upload and Manage Solicitation Documents section of this guide. While most of the document types are the same as those covered in the Upload and Manage Solicitation Documents section, the following options are unique to the Prepare Solicitation Tab:

- **[Template] RFX Excel answer form** – The item grid in Excel format
- **Ad-hoc Solicitation Document** – A document specific to the relevant solicitation that does not fall under one of the other document types
- **RFX Commercial Documents** – Reference documents that can be referred to on all State projects (i.e. documents pulled from the General Documents section of the Setup Documents tab, the RFP, etc.)
- **RFX Technical Documents** – Technical documents related to the RFX

▲ Be sure to include all RFX documents that will be available to the public – this should include the Main Document, all Supplements, and the Cost Summary

▲ In general, users should select **Public Solicitation Documents (Approved)** as the Type

▲ See the finished Documents section for the right for a complete example



Setup Documents Technical Questions Technical evaluation questions F

0 Selected Zip Selected Documents

Title	Type
<input type="checkbox"/> OA1228 Personal Income Tax System Attachment Nine	Public Solicitation Documents (Approved)
<input type="checkbox"/> OA1228 Personal Income Tax System Supplement 4	Public Solicitation Documents (Approved)
<input type="checkbox"/> OA1228 Personal Income Tax System Supplement 3	Public Solicitation Documents (Approved)
<input type="checkbox"/> OA1228 Personal Income Tax System Supplement 2	Public Solicitation Documents (Approved)
<input type="checkbox"/> OA1228 Personal Income Tax System Supplement 1	Public Solicitation Documents (Approved)
<input type="checkbox"/> OA1228 Personal Income Tax System RFP	Public Solicitation Documents (Approved)

## Step-by-Step Instructions for Completing the Prepare a Solicitation Tab

8

- b) Click **Attach Existing Documents** to select any documents already contained in the Setup Documents tab by clicking the **Checkbox** ( ☐ ) icon to the left. After you have selected the appropriate documents, click **Save & Close**.

<input type="checkbox"/>	Title	Contact	Last Modification (UTC-5)	Creation Date (UTC-5)	Validity End Date	Version
<input type="checkbox"/>	Independent Contractor Acknowledgement Form	ROBINSON Will	6/23/2020 6:35:48 PM	6/23/2020 6:35:48 PM		

9

Click **Save & Close**.

Save & Close

Users also have the option to begin the creation of a contract document using the Documents section of the Prepare Solicitation tab. Click **Create Contract Document**

Create Contract Document

This will give users the option to create a contract document using either Native or MS Word Authoring.

Create New Document Using...

☒ **Native Authoring**  
Build your document using the Clause Library  
Edit directly with the application.

Or

☐ **MS Word™ Authoring**  
Import a Word™ document and edit with full MS Word™ Redlining functionality

Cancel OK

Input the **Document Name** and then click **Save**. Users can then leverage all of the same authoring tools available for contract documents. For more information on contract document authoring, please refer to the Creating and Managing Contracts Learner Guide.

Suppliers will be able to download the document, add comments and/or edits to the document, and attach a copy of the file as an attachment when submitting their proposal. For more details on how to review Supplier edits and how to transfer the Early Contract document to the contract record, please refer to the Creating and Managing Contracts Learner Guide.

Note that the document's status must be Approved and the Visible to Supplier checkbox must be enabled on the document in order for Suppliers to be able to access the contract document as part of submitting their response.

Return to  
Navigation Page

# SETUP MANDATORY TECHNICAL AND/OR FINANCIAL QUESTIONNAIRES FOR A SOLICITATION

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
Creating and Preparing Solicitations					
Setup Mandatory, Financial, and/or Technical Questionnaires for a Solicitation		✓	✓	✓	

## Overview

- What's Covered: The process for adding questionnaire questions to a solicitation in OhioBuys either by uploading a template or by creating questions individually
- Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
- Used When: Adding questionnaires to a solicitation in OhioBuys

### Step-by-Step Instructions for Setting Up Questionnaires for a Solicitation

1

▲ If you would like to complete your evaluation and award based on combined technical and cost score, please refer to the [Appendix](#) for details on how your questionnaires should be configured.

Log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

2

The Sourcing Projects page is displayed. On this page, you can enter search terms to locate your solicitation. Enter search terms in the Keywords search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, RFx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** (⌵) icon.

3

Open the sourcing project you would like to edit by clicking the **Pencil** (✎) icon.

Solicitation ID	Sourcing Project Name	Solicitation Type	Workflow Status	Commodity	Contracting Entity	Sourcing Step Shortcuts
✎ SRC000000814	MWK Sourcing Project Test	Triple Envelope		• Livestock		

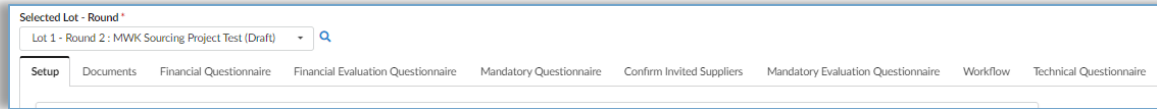
4

Navigate to the **Prepare Solicitation** tab.

- Setup Project
- Setup Team
- Inquiry
- Project Schedule
- Requirements Gathering
- Setup Documents
- Add Suppliers
- Prepare Solicitation**

### Step-by-Step Instructions for Setting Up Questionnaires for a Solicitation

Click on either the **Mandatory Questionnaire**, **Financial Questionnaire** or **Technical Questionnaire** tabs as applicable.



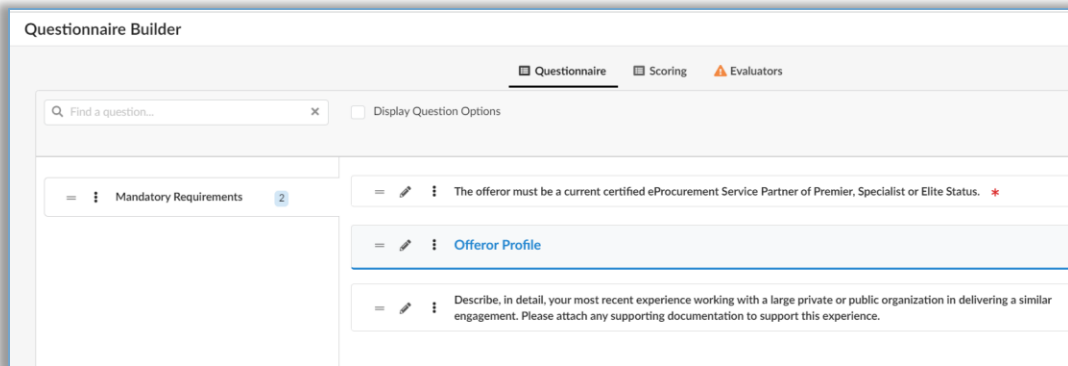
5

▲ For Simple and Single Envelope Solicitations, a generic Questionnaire tab is visible. The process for completing this tab is the same as for a Mandatory, Financial, or Technical questionnaire.

Click **Edit Questions & Scoring**.

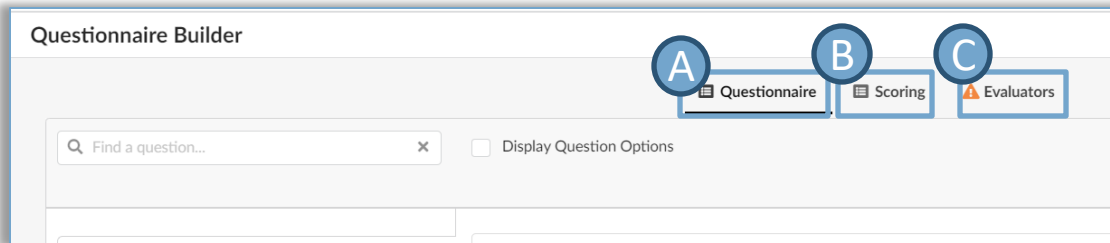
Edit Questions & Scoring

The **Questionnaire Builder** is displayed.



The Questionnaire Builder is divided into a **Questionnaire** tab, a **Scoring** tab, and an **Evaluators** tab.

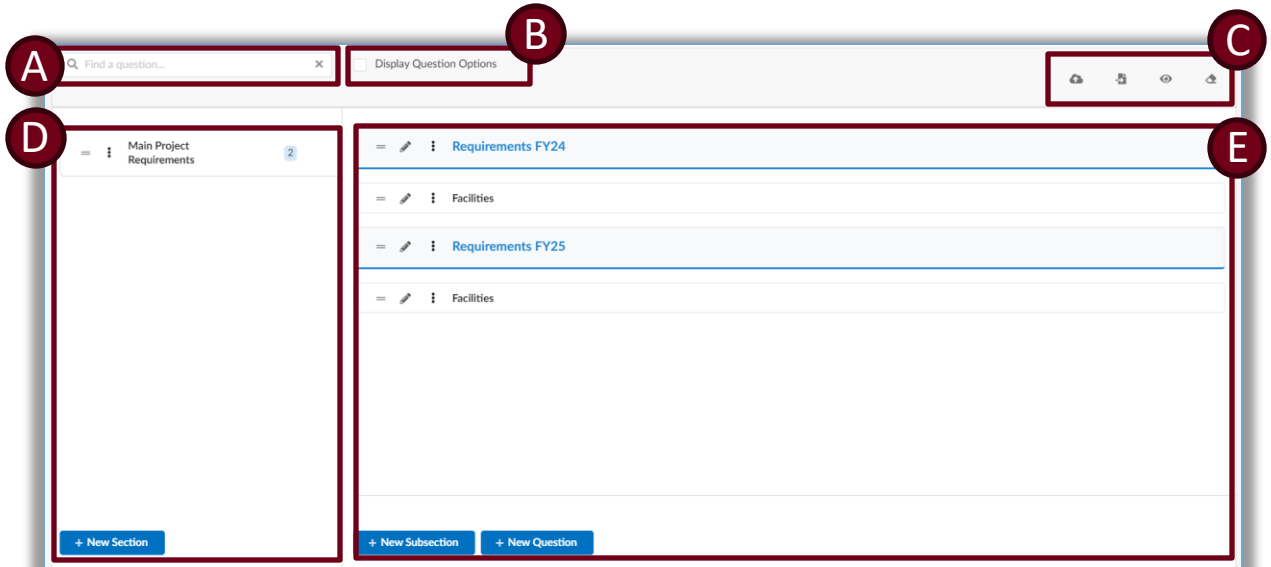
6



- The **Questionnaire** tab is where users will build the questionnaire, either by manually adding sections and questions, or by importing a questionnaire template.
- The **Scoring** tab is where users will assign weights to each of the questionnaire sections and questions.
- The **Evaluators** tab is where users will indicate who should be responsible for evaluating responses to the questionnaire once it is complete.

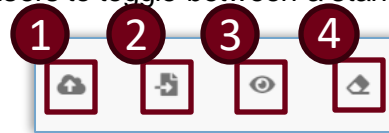
### Step-by-Step Instructions for Setting Up Questionnaires for a Solicitation

On the **Questionnaire** tab, users have a variety of options to input and navigate questions.



- The **Search Bar** can be used to search within the content of questions in the questionnaire.
- The **Display Question Options** checkbox allows users to toggle between a standard, and more detailed view of the questionnaire.

- There are 4 **Quick Action Buttons**:



1. The **Import/Export Excel** (☁️) button allows users to either import previously exported questionnaires that have been saved as Excel files, or to export the current questionnaire into an Excel file.
2. The **Import Existing Template** (📄) button allows users to import previously saved questionnaire templates housed within OhioBuys.
3. The **Preview** (👁️) button allows users to view what the questionnaire will look like to a respondent.
4. The **Clear All** (🗑️) button allows users to remove all questions currently in the questionnaire.

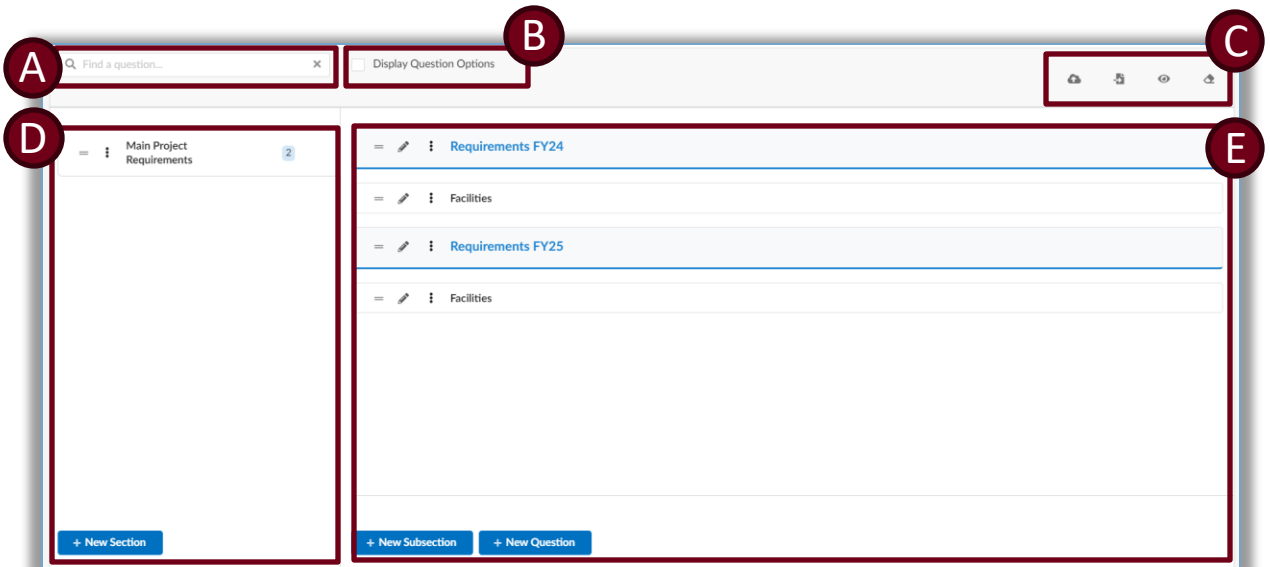
- The questionnaire **Sections** are displayed on the left side of the screen. Users can use the **New Section** button to create a new section.

[+ New Section](#)

- ▲ Users must create a section prior to adding questions or subsections to a questionnaire.
- ▲ Existing sections can be reordered by clicking, and dragging the **Order** (=) icon.
- ▲ Clicking the **More Options** (⋮) icon allows users to edit, duplicate, or delete a section, or mark all questions within a section as either scored or unscored.



## Step-by-Step Instructions for Setting Up Questionnaires for a Solicitation



7

- e) The questionnaire **Subsections** and **Questions** are displayed on the right side of the screen. Users can use the **+ New Subsection** button to add a new subsection, and the **+New Question** button to add a new question

+ New Subsection

+ New Question

- ▲ Note that subsections are **not** required to add questions to the questionnaire
- ▲ Questions will appear within the subsection that they are immediately below (i.e., if a question is listed higher than and subsection, that question will appear outside of any subsection)
- ▲ Existing subsections and questions can be reordered by clicking, and dragging the **Order** (=) icon
- ▲ Questions and subsections can be opened and edited by clicking the **Pencil** (✎) icon
- ▲ Clicking the **More Options** (⋮) icon allows users to duplicate, move, or delete a question or subsection

8

Click **+ New Section** to create a new questionnaire section.

+ New Section

## Step-by-Step Instructions for Setting Up Questionnaires for a Solicitation

9

Questionnaire Element

Questionnaire element

Code

Section\*

Label

Description / Instructional Text

Description / Hints

☒ Several respondents allowed

Complete the **Section** field which will serve as the name for this section. Users can also optionally complete the **Description / Instructional Text** field to add additional context or instruction to the header of the section.

When you are finished, click **Save & Close** to return to the Questionnaire Builder, or click **Save & New** if you want to add additional sections.

[Save & Close](#)

10

To add subsections, repeat the process in steps 8 and 9, only begin by clicking **+ New Subsection** rather than + New Section.

[+ New Subsection](#)

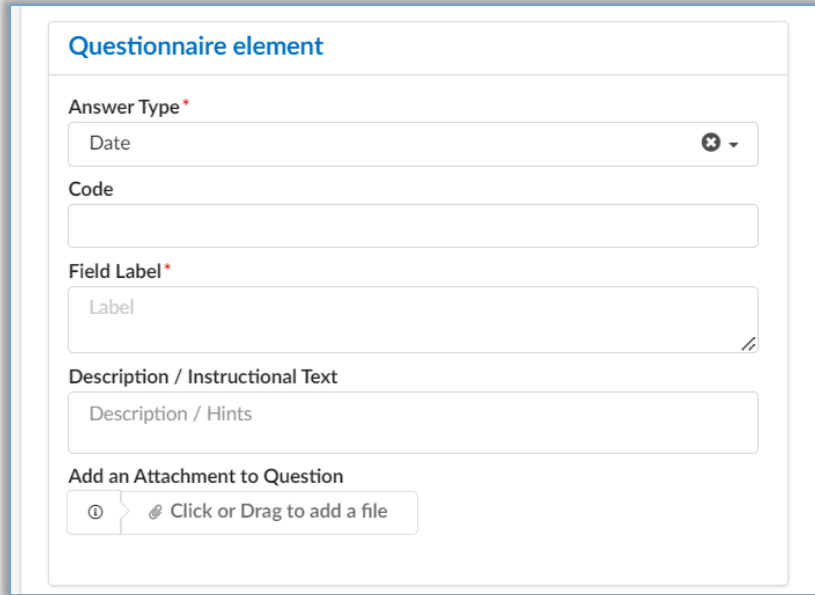
11

Click **+ New Question** to add a new question.

[+ New Question](#)

## Step-by-Step Instructions for Setting Up Questionnaires for a Solicitation

The **Questionnaire Element** page is displayed. Complete the mandatory fields, including the **Field Label** (i.e., the name of the field) and the **Answer Type**.



The screenshot shows a form titled "Questionnaire element". It contains the following fields and options:

- Answer Type\***: A dropdown menu with "Date" selected and a clear icon.
- Code**: A text input field.
- Field Label\***: A text input field with the placeholder text "Label".
- Description / Instructional Text**: A text input field with the placeholder text "Description / Hints".
- Add an Attachment to Question**: A section with a plus icon and the text "Click or Drag to add a file".

The different Answer Types available are listed below:

12

- **Text:** This answer type allows the respondent to type the response into the questionnaire without restrictions on the type of characters that are used (i.e. letters, numbers, symbols).
- **Long Text:** Similar to Text, this answer type allows all character types in the response. The character limit for Long Text questions is significantly longer than for Text and should be utilized for in-depth responses.
- **Numeric:** This answer type will only allow numeric characters without symbols such as periods, commas, or dashes.
- **Date:** This answer type will only allow answers in the date format. When the respondent clicks inside the field, they will be able to select a date from a calendar.
- **Attachment (Single File):** This answer type allows the respondent to attach one file to the questionnaire.
- **Attachments (Multiple Files):** This answer type allows the respondent to attach multiple files to the questionnaire.
- **List of values:** This answer type allows the sourcing responsible to restrict the respondent's answer to a list of values.
- **Selector:** This answer type allows the user responsible for the solicitation to restrict the respondent's answer to a list of values. The list must already exist in OhioBuys. (e.g., country, state) To make your own list, please use List of Values.
- **Supplier Document:** This answer type requires that the user indicate which Supplier Document Type they want the respondent(s) to upload. These documents can be quickly applied to a Supplier's record in OhioBuys directly from within the solicitation. (e.g., if a user uploads a Supplier's license to do business)

### Step-by-Step Instructions for Setting Up Questionnaires for a Solicitation

- ▲ If you create a question with the **Selector** question type, you will need to choose what kind of value the Supplier will respond with from a series of pre-configured lists. You should use the Selector question type for common lists of values. (e.g., Commodity, State, Language)

The screenshot shows the configuration for a 'Selector' question type. On the left, there are fields for 'Answer Type\*' (set to 'Selector'), 'Code', and 'Field Label\*'. On the right, there is a 'Selector\*' dropdown menu with a list of options: 'APE Code (naf)' and 'Civility (civility)'. A 'Question scored' checkbox is also visible on the far right.

- ▲ If you create a question with the **List of Values** question type, you will need to input the values that Suppliers can choose from. Scroll down, and type in the first value in the **Possible Values** field. If you would like the question to be auto-scored, indicate the score you would like to associate with that selection in the **Scoring** field. You can also use the **Att.** checkbox to indicate that the respondent must submit an attachment if they choose that value, and the **Com.** checkbox to indicate that the respondent must provide a comment if they choose that value.

The screenshot shows the 'List of Possible Values' configuration interface. At the top, there are three annotations: 'A' points to the 'Duplicate from template or question' dropdown menu; 'B' points to the 'Dropdown list' dropdown menu; and 'C' points to the '+ New Line' button. Below these, there is a table with columns: 'Possible Values\*', 'Scoring', 'Att. ⓘ', and 'Com. ⓘ'. The table currently has one row with an empty 'Possible Values' field, a '0' in the 'Scoring' column, and empty checkboxes in the 'Att.' and 'Com.' columns. At the bottom, it says '0 Record(s)'.

- You can copy the list of values created on another question in the questionnaire by clicking the **Duplicate from template or question** field and selecting it from the drop-down menu.
- You can choose whether you would like these values to be presented to the Supplier as Checkboxes, Radio Buttons, Buttons, or a Dropdown list. It is not recommended that you use the Stars option.
- Click **+ New Line** to add another value.

When you have added all of the necessary values, click **Save & Close**.

### Step-by-Step Instructions for Setting Up Questionnaires for a Solicitation

13

The **Advanced Properties** section allows users to indicate if multiple answers are allowed for a single question, if the question is required, if additional comments can be added to clarify an answer selection, and/or if the respondent can add an attachment to their answer.

#### Advanced Properties

Mapped with the field

☐ Multiples answers allowed

☐ Required

☐ Add Comment Field to Clarify the Answer

☐ Add an Attachment to Answer

14

The **Scoring Parameter** section allows the sourcing analyst to indicate the basis on which the question will be scored, as well as the consequences for certain scores, and the weight of the question. Note that the weight can also be modified later on the **Scoring** tab of the Questionnaire Builder.

▲ Note that questions in the Technical Envelope are generally scored on a scale from 1-5.

▲ Note that questions in the Financial Envelope can be scored on the same 1-5 scale as questions in the Technical Envelope, or can be scored using the Price Mark Scoring option which will automatically assign a score based on the Supplier's total bid compared to other bidders.

#### Scoring Parameter

Scoring\*

Numeric

Eliminatory score

Question Weight\*

1

Display mode\*

Enter value

☐ File can be attached to the score

☐ A comment can be added to clarify the score

☐ Not Applicable Allowed ⓘ

When adjusting the weighting for a questionnaire, users should change the weighting value in relation to how much they want that question/section to be emphasized. Note that weighting will always sum to 100%. Please refer to the following example:

Question	Weighting	Percentage
Question 1	2	40%
Question 2	2	40%
Question 3	1	20%

Example: If Question 1 and Question 2 were both twice as important as Question 3, they would have a weighting of 2, while Question 3 would have a weighting of 1.

## Step-by-Step Instructions for Setting Up Questionnaires for a Solicitation

15

When finished editing the question details, click **Save & Close**.



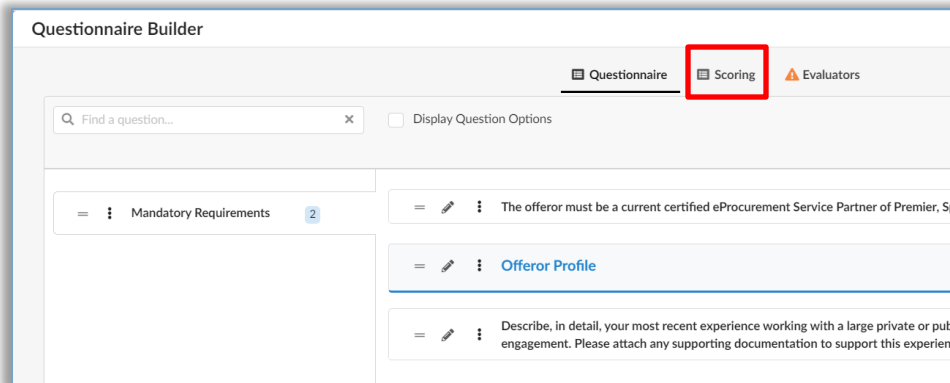
16

Repeat steps 11-14 to add more questions. When the questionnaire is complete, click the **Preview** Quick Action Button to see what the questionnaire will look like from the respondent's perspective.




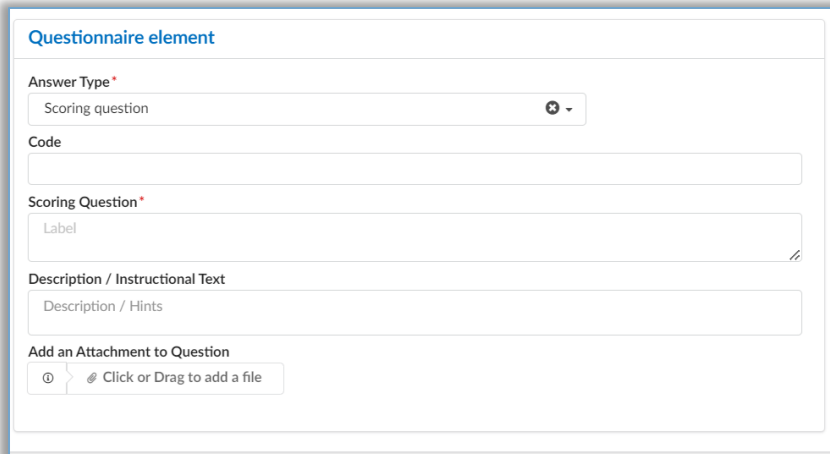
17

To view scoring settings, or to add additional scoring questions, navigate to the **Scoring** tab.



18

To view and edit the scoring setup for existing scored questions, click the **Pencil** (  ) icon. Users can also add additional scoring questions that **will not** appear as questions for proposal respondents by clicking the **+ New Question** button.

A screenshot of the 'Questionnaire element' form. The 'Answer Type' dropdown is set to 'Scoring question'. The 'Code' field is empty. The 'Scoring Question' section has a 'Label' field. The 'Description / Instructional Text' section has a 'Description / Hints' field. At the bottom, there is an 'Add an Attachment to Question' section with a 'Click or Drag to add a file' button.

All questions in the Scoring section will have an **Answer Type** of Scoring Question. Refer to step 14 for details on configuring the Scoring Parameter. When you are finished, click **Save & Close**.

## Step-by-Step Instructions for Setting Up Questionnaires for a Solicitation

To assign Evaluators for questionnaire sections, navigate to the **Evaluators** tab.

The screenshot shows the 'Questionnaire Builder' interface. At the top, there are three tabs: 'Questionnaire', 'Scoring', and 'Evaluators'. The 'Evaluators' tab is highlighted with a red box. Below the tabs, there is a search bar labeled 'Find a question...' and a checkbox for 'Display Question Options'. On the left, there is a list of questionnaire sections, including 'Mandatory Requirements' with a count of 2. On the right, there are three questionnaire items, each with a pencil icon for editing. The first item is 'The offeror must be a current certified eProcurement Service Partner of Premier, Sp', the second is 'Offeror Profile', and the third is 'Describe, in detail, your most recent experience working with a large private or pub engagement. Please attach any supporting documentation to support this experien'.

To add a rule regarding how the questionnaire will be evaluated, click **+ Add the Rule**.

The screenshot shows the 'Default Respondent Rules' dialog box. It has a title bar with the text 'Default Respondent Rules'. Below the title bar, there are three buttons: '+ Add the Rule', 'Reset Rules', and 'Clear All'. The '+ Add the Rule' button is highlighted with a red box.

▲ **Reset Rules** can be used to revert respondent rules after they have been added.

▲ **Clear All** can be used to delete any respondent rules that have been created.

- Indicate the specific user(s) or member(s) of the project team in either the **The User** field, or the **Or Role** field.
  - In the **Will answer** field, select one, multiple, or all sections that the respondent needs to complete. Note that if this field is left blank, the respondent will be assigned to complete all sections/subsections.
- ▲ If the questionnaire is being assigned to users with a specific role or local profile, the respondents must be added to the Setup Team prior to releasing the questionnaire.

The screenshot shows the 'Add New Respondent Rule' dialog box. It has a title bar with the text 'Add New Respondent Rule'. Below the title bar, there are two dropdown menus: 'The User:' and 'Or Role:'. The 'The User:' dropdown is labeled 'select user...' and the 'Or Role:' dropdown is labeled 'select role...'. Below these, there is a 'Will answer:' dropdown menu labeled 'all sections/subsections'. At the bottom, there are two buttons: 'Save' and 'Cancel'.

### Step-by-Step Instructions for Setting Up Questionnaires for a Solicitation

After selecting the appropriate values, click **Save**.

Save

- ▲ Users can also individually assign respondents to specific sections and subsections in the **Respondents Assigned** table below by typing the user(s) name(s) in the **Respondents** field.

Type	Section	Respondents
Sub Section	Requirements FY24	KAIZER Michael
Sub Section	Requirements FY25	KAIZER Michael

21

Click the **X** icon in the top right corner to close the Questionnaire Builder. Then click **Save**.

Save

22

Repeat this process for any additional questionnaires as appropriate based on the selected Sourcing Project Type.

23

- ▲ Note that the process for uploading questionnaires is the same regardless of whether the questionnaire is mandatory, technical, or financial.
- ▲ Any documents uploaded by Bidders and/or Suppliers as part of their questionnaire responses will **not** be automatically pulled into the contract record when making an award. Documents uploaded only to the questionnaire will need to be downloaded and manually added to the contract record at a later time.
- ▲ In order to ensure all documents uploaded by Bidders and/or Suppliers can be pulled into the contract record automatically, it is recommended that users instruct Suppliers to upload a copy of **all** documents submitted as part of their response to their response header.



# INVITE POTENTIAL BIDDERS AND/OR SUPPLIERS TO RESPOND TO A SOLICITATION

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
Creating and Preparing Solicitations					
Invite Potential Bidders and/or Suppliers to Respond to a Solicitation	✓	✓	✓	✓	

## Overview

- What's Covered: The process for inviting Suppliers to respond to a solicitation in OhioBuys
- Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
- Used When: Identifying potential respondents to a solicitation

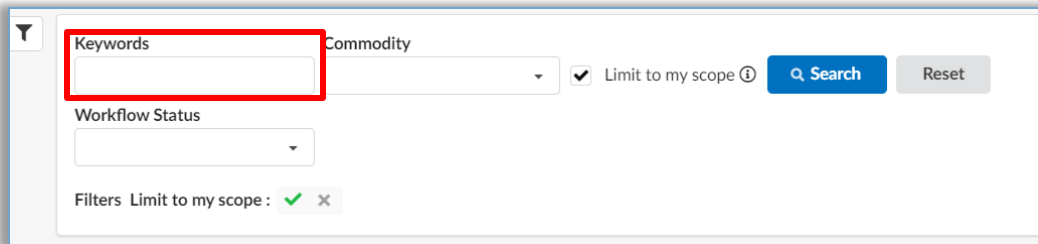
## Step-by-Step Instructions for Inviting Bidders and/or Suppliers to a Solicitation

1

Log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

2





The Sourcing Projects page is displayed. On this page, you can enter search terms to locate your solicitation. Enter search terms in the Keywords search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.



▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, RFx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** (🔍) icon.

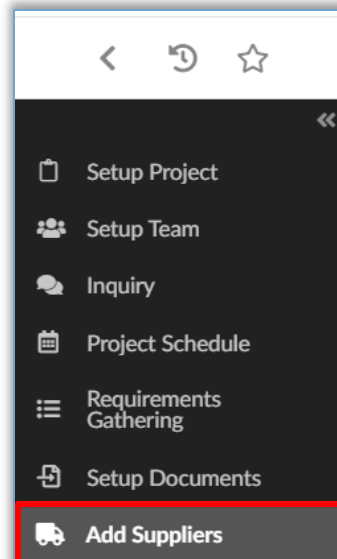
3

Open the sourcing project you would like to edit by clicking the **Pencil** (✎) icon.

Solicitation ID	Sourcing Project Name	Solicitation Type	Workflow Status	Commodity	Contracting Entity	Sourcing Step Shortcuts
✎ SRC000000814	MWK Sourcing Project Test	Triple Envelope		• Livestock		   

4

Navigate to the **Add Suppliers** tab.



### Step-by-Step Instructions for Inviting Bidders and/or Suppliers to a Solicitation

5

If applicable, indicate the **Master Contract** for the solicitation. This will automatically add all Suppliers associated with the Contract to the list of invited Suppliers.

- ▲ This is most commonly used when a contract has already been awarded to a pool of pre-qualified Suppliers and secondary solicitations amongst those Suppliers are required before a purchase can be made

6

Inviting Suppliers gives the Supplier the ability to see the solicitation and respond when they log into the application. Suppliers not invited will have to locate the solicitation on the public portal first and click the 'Participate in RFx' button to gain access to it. Going forward, OhioBuys will automatically notify all Bidders and/or Suppliers who have a commodity on their profile that is in the same category as the commodity or commodities listed on the solicitation.

- ▲ Note that while commodity Suppliers are notified, only selected Suppliers are specifically invited to participate in the solicitation.

Click the **Selector** ( - ) icon on the **Select Suppliers** field. By default this drop-down will display all of the Bidders and Suppliers who have set their account up with the relevant commodity code(s) in OhioBuys. To add additional Bidders and/or Suppliers, click **See All**.

After clicking **See All**, a list of potential Bidders and/or Suppliers is displayed. By default this list will be filtered to only show Bidders and/or Suppliers who offer the commodity for your solicitation. Users can refine this search using different filters such as **Keywords**, **Commodities**, **Dealers**, etc.

- ▲ By default OhioBuys will filter the Bidders / Suppliers by the commodity code associated with the line item. To see additional Bidders and/or Suppliers, or Bidders / Suppliers who have not set their accounts up with that commodity code in OhioBuys, you will need to clear the commodity filter. To do this, click the **X** icon next to the commodity name in either the Commodities field, or the filter. Then click **Search**.

- ▲ Please note, OhioBuys requires the selection of at least 1 Bidder or Supplier. If the user does not want to select any individual Bidders and/or Suppliers, search for the Supplier ID associated with the contracting entity (e.g., DAS01, DPS01, etc.) in the Keywords field and select this Supplier in the search results. In order to do this, the chosen Supplier record must have a contact associated with it. Doing so fulfills the need to invite at least 1 Supplier.
- ▲ You can also filter your results to only show Suppliers with a Supplier Contact by toggling the **Supplier Contact on File** radio button.

If the MBE Set Aside slider is clicked, the solicitation will be flagged as MBE set aside on the Public Solicitations page. Users will only be able to invite MBE Suppliers to respond to the solicitation. Additionally, only registered MBE Suppliers will be able to respond to the Solicitation.

### Step-by-Step Instructions for Inviting Bidders and/or Suppliers to a Solicitation

6

Click the **Checkbox** ( ☐ ) icon to select a particular Bidder or Supplier or click the **Checkbox** ( ☐ ) icon next to the **Code** header to select all of the displayed Bidders and/or Suppliers.

Browse Suppliers

Keywords: [ ] Commodity: [ ] Search Reset

City: [ ] Counties Served: [ ] Dealers: [ ] Children of main Supplier: [ ]

Code: [ ] Supplier Commodities: [ ] Set ID: [ ]

Filters: Level: Supplier Head-office Set ID: STATE

Code	Supplier Name	Status	Address	Location	State
<input type="checkbox"/>	0000008269 SUP007004 #1 RADON TESTER	Active Supplier	171 HALL RD	Pennsylvania	ALIQUIPPA 15001 171 HALL RD STATE

7

To modify the list of added Bidders and/or Suppliers:

Supplier	Status	Main Contact	Invited <sup>①</sup>
#1 RADON TESTER	Active Supplier	SUPPLIER Radon (b@kll.com)	<input checked="" type="checkbox"/>
1 BUCKEYE LAWN & LANDSCAPES LLC	Active Supplier	3M Contact (3mCEO)	<input checked="" type="checkbox"/>
2 Result(s)			

- Use the **Trashcan** ( ) icon to remove a Bidder or Supplier from the list of invited Bidders and/or Suppliers.
- Update the **Main Contact** field with the name of the Bidder or Supplier contact that should receive the invitation to respond – note that the Bidder or Supplier must have a contact in OhioBuys to be invited to participate in the solicitation.
- Use the **Invited** checkbox to determine whether or not a Bidder or Supplier on the list should be invited to respond to the solicitation.

8

Click **Save**.



To pull in dealers from a specific contract, users can use the Other Contracts field. To do this, enter and select the correct contract, click Save, and then all of the associated dealers will be added to the Add Suppliers tab. Note that this means only Suppliers with an active Supplier Contact in OhioBuys will be notified about the solicitation.

Additionally, users can click See All on the Other Contracts field, search by an index number on the left side (e.g. STS123), check all of the contracts that come back, and then pull in all dealers for a particular index number.

# DEFINE PREFERENCE FACTORS

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
Creating and Preparing Solicitations					
Define Preference Factors for a Solicitation					

---

## Overview

- What's Covered: The process for defining preference factors in OhioBuys
- Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
- Used When: Defining preference factors in an ITB RFx

## Step-by-Step Instructions for Defining Preference Factors for a Solicitation


▲

In certain solicitations, the State of Ohio is required to apply preference factors to solicitations (e.g. Buy Ohio, Buy America). These preference factors are applied at item level, where the sourcing team must analyze whether it is worth it to pay more for a given product if it is made in Ohio or the United States.

1

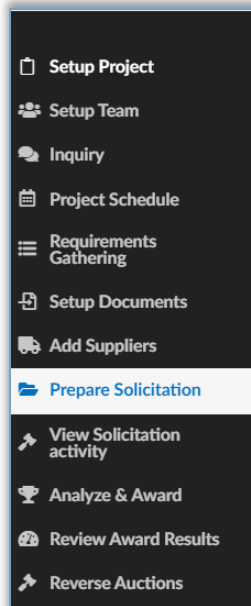
Log in to OhioBuys. From the Main Menu Navigation Bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

2

In the **Keywords** field, search for the solicitation that you would like to edit and select the **Pencil** (  ) icon next to the project.

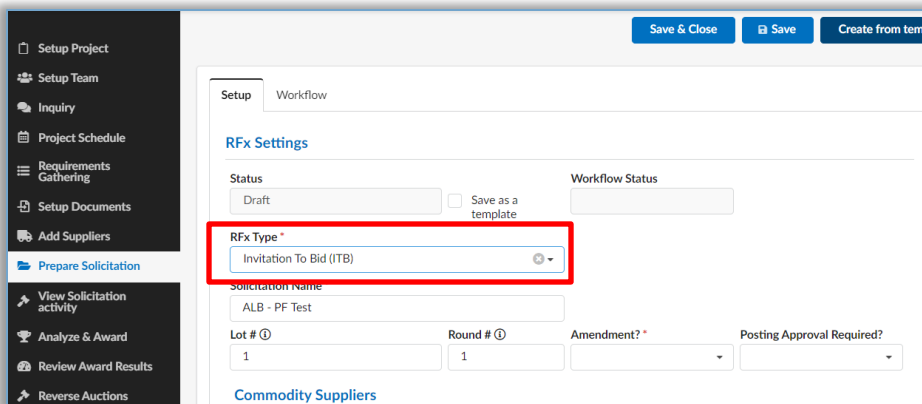
3

Navigate to the **Prepare Solicitations** tab.



4

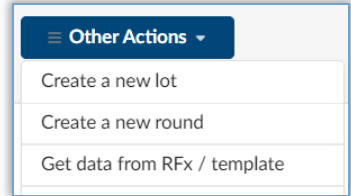
Confirm the **RFx Type** field is equal to **Invitation to Bid (ITB)**.

A screenshot of the OhioBuys 'Setup' tab. The 'Workflow' sub-tab is active. The 'RFx Settings' section is visible, with the 'RFx Type' field set to 'Invitation To Bid (ITB)'. The 'Status' is 'Draft' and 'Workflow Status' is empty. Below the 'RFx Settings' section, the 'Solicitation Name' is 'ALB - PF Test'. The 'Lot # ①' is '1', 'Round # ①' is '1', 'Amendment? \*' is empty, and 'Posting Approval Required?' is empty. The 'Commodity Suppliers' link is at the bottom.

## Step-by-Step Instructions for Defining Preference Factors for a Solicitation

5

Complete the remaining mandatory fields, then click the **Other Actions** button and select **Get Data from RFX / template** from the drop-down menu.



6

Remove the Commodity and Organization filters by selecting the **x (⊗)** icon next to each value. Then click **Search**.

7

Click the radio button next to option that has a **Solicitation Name** of "Preference Factors".

RFX Type	Lot #	Round #	Solicitation Name	Begin Date	End Date	Status
<input type="radio"/> Cancellation	1	1	Cancellation template	4/13/2020	4/22/2020	Draft
<input checked="" type="radio"/> Invitation To Bid (ITB)	1	1	Preference Factors	7/9/2020	7/10/2020	Under Evaluation
2 Result(s)						

8

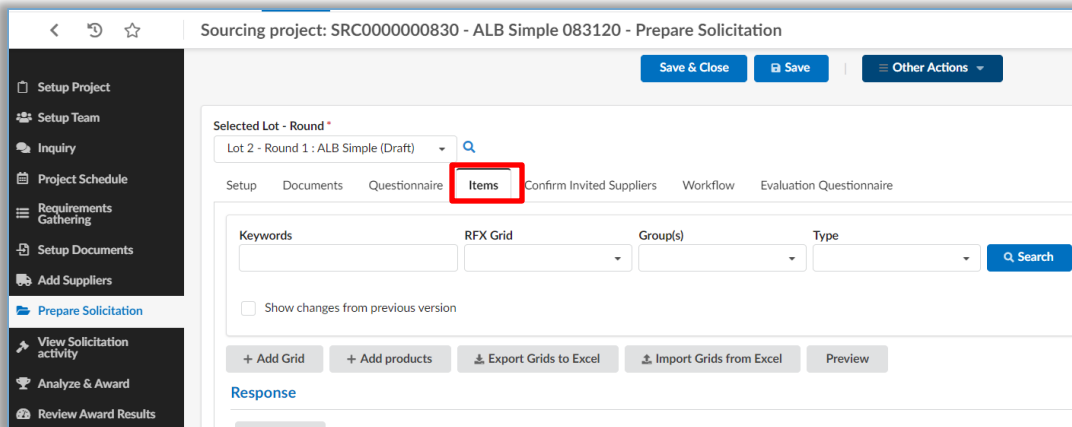
Click the **Create** button.



▲ A pop up window will appear. Click the **Continue** button.

9

The **Items** tab will be updated with columns added for preference factors. Continue to the next section of the learner guide for instructions on how to complete the Item Grid.



▲ If applying preference factors, please complete this process **prior** to setting up your item grid.

# SETUP A SOLICITATION ITEM GRID

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
Creating and Preparing Solicitations					
Setup a Solicitation Item Grid	✓	✓	✓	✓	✓

---

## Overview

- What's Covered: The process for setting up an item grid, which is a list of the items being sourced and information relevant to them, for a solicitation in OhioBuys
- Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
- Used When: Preparing a solicitation



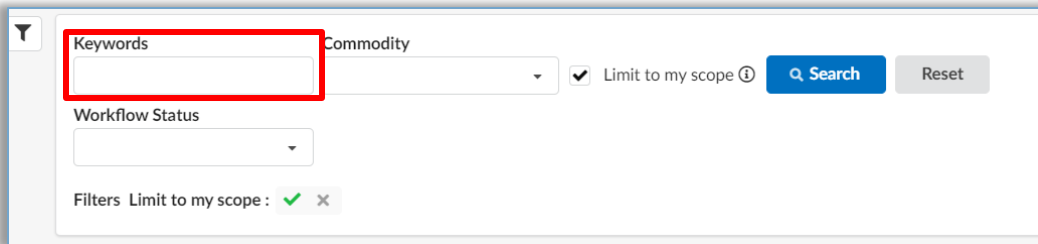
## Step-by-Step Instructions for Setting Up an Item Grid for a Solicitation

1

Log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

2

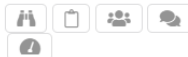
The Sourcing Projects page is displayed. On this page, you can enter search terms to locate your solicitation. Enter search terms in the Keywords search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.



▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, RFx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** (⌵) icon.

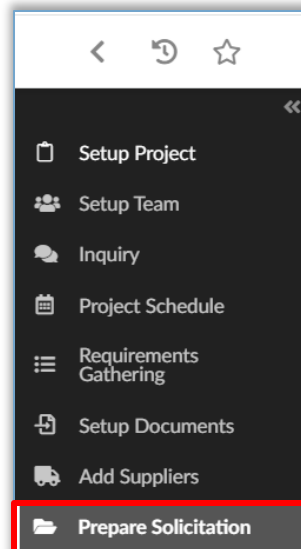
3

Open the sourcing project you would like to edit by clicking the **Pencil** (✎) icon.

Solicitation ID	Sourcing Project Name	Solicitation Type	Workflow Status	Commodity	Contracting Entity	Sourcing Step Shortcuts
✎ SRC0000000814	MWK Sourcing Project Test	Triple Envelope		• Livestock		

4

Navigate to the **Prepare Solicitation** tab.



## Step-by-Step Instructions for Setting Up an Item Grid for a Solicitation

Navigate to the **Items** tab.

The Items tab is where you can define the list of products and services to be sourced and any other cost items to be taken into account. This list of items and the Supplier's quantitative response to the request allow for a well-defined comparison of the proposals from different Suppliers. If a sourcing project is built from a purchase requisition, the lines of the requisition selected during setup are automatically added to the Items tab. They may be adjusted on this tab, however, without affecting the requisition.

5

If a sourcing project is created from scratch, you may add items directly on the screen or upload them using an Excel spreadsheet.

Item Types	Description
Required Item	These are the items to be sourced by default. Items are included in the proposal's total amount
Optional Item	This type allows Suppliers to offer optional items that relate to required items. Optional items are not included in the proposal's total amount.
Additional Fees	This type allows Suppliers to declare additional costs linked to required items. Additional fees are included in the proposal's total amount.
Price Adjustment	Price adjustments are cost items that may be added by the buyer and that remain hidden to Suppliers. Price adjustments are included in the proposal's total amount.

**Name of the pricing grid –**  
(defined in the grid settings:  
full label or if not provided,  
short label)

**Actions button –** Access to  
grid and item management  
features (create, edit,  
delete)

Response

≡ Actions

Code (V) *	Type (V) *	Label (V) *	Qty (V) *	Unit (V) *	Unit price (V)	Amount (V)	Reference Price	Deliv. date (V)	Deliv. date (V)	Supplier Attachments (V)	Comments (V) ⓘ
i1_2	Required Item										
1	Required Item	Base;OptiPlex 7090 Tower XCTO	10	Each	160.0000			1/31/2022			

1 Result(s)

**Columns filled in by  
the buyer** (light gray  
column header)

**Columns filled in by  
the supplier** (dark gray  
column header)

## Step-by-Step Instructions for Setting Up an Item Grid for a Solicitation

6

Click **+ Add Grid** to add a section to the Item Grid.

The Grid Browse page is displayed.

- a) Users can search for an existing item grid using the Keywords search. Once you have identified the item grid you would like to use, click the **Checkbox** (☐) icon.

<input type="checkbox"/> RFX Type	Solicitation Name	Grid Name
<input type="checkbox"/> Service purchase - T&M	Service purchase T&M Template	
<input type="checkbox"/> Service purchase - Fixed Fee	Service purchase Template	
<input type="checkbox"/> Request for Quote (RFQ)	Request For Quote (RFQ) Template	Response
<input type="checkbox"/> Request For Proposal (RFP) (Triple Envelope)	Request For Proposal (RFP) - Triple Envelope Template	Response
<input type="checkbox"/> IFP (DAS/OPS Only) (Double Envelope)	Double envelope Template	Response
<input type="checkbox"/> IFP (DAS/OPS Only) (Triple Envelope)	Triple envelope Template	Response

- b) To create a new grid, click **Create Grid**.

Create Grid

7

- 1) Enter the **Grid Name**.
- 2) Indicate in the **Grid Type** field whether this is a main grid or a grid with a parent. If it is a grid with a parent, select it in the **Parent Grid** field. This will add the new grid as a sub-grid on the same sheet as its parent. (i.e., two conjoined but separate item grids that can have different columns)
- 3) Write a **Description** of the item grid.
- 4) Click **Save & Close**.

Save & Close

Step-by-Step Instructions for Setting Up an Item Grid for a Solicitation

7

To manage pricing grids, click on the action buttons above the grid:

Action Button	Result
Add Grid	Create a new pricing grid below the current one
Export Grids to Excel Import Excel grids	Use “Export grids to Excel” to download a template import file (will include any item already added)  This file will be filled in offline and then will be imported back by clicking “Import Excel grids”.
Actions / Grid settings	Edit the settings of an existing grid. These grid settings include short label, full label, display order among other pricing grids. The full label will be used as the grid title in the Items tab. It if is missing, the short label will be used instead.
Actions / Duplicate this grid	Create a new grid based on the current grid with all the same columns, items, the grid name and the display order incremented by 1.
Actions / Delete this grid	Remove the pricing grid

8

Entering Items Into a Pricing Grid

To create an item, click on the **Actions** button and select the option **Add Item**. The item management window pops up.

The form for creating items allows the user to fill in all the fields from the grid that need to be entered on the buyer’s side.

## Step-by-Step Instructions for Setting Up an Item Grid for a Solicitation

## Alternative Ways to Create Items

Right-clicking on an existing item brings up another menu offering the following alternative ways to create items:

8

Function	Description
Insert an item	Creates a new item and inserts it above the item you right clicked
Duplicate this item	Copies the item you right-clicked and inserts the copied item right below it

## Importing and Exporting Pricing Grids

9

1. Click the **Export Grids to Excel** button to download a copy of the grid in Excel format to make updates/changes to items offline.
2. Save the file to the location of your choice, then open in MS Excel. The Excel document contains several tabs:
  - Instructions: instructions to use the document. Read these carefully
  - Columns: dictionary of usable columns in the different grids of items
  - Grids: list of response grids
  - Tabs « response grid »: contains one tab per grid. In the grids, the sections in white or in gray are to be completed by the buyer. These columns will contain the data to be imported.
3. Enter the rows of items in the different grids.
4. Save the file.

## Step-by-Step Instructions for Setting Up an Item Grid for a Solicitation

1. Click the **Import Grids from Excel** button to import new items.
2. Click on **Browse**, select the file to be imported, then click on **Open**.
3. Click **Check Import**. A preview of the modifications imported is displayed.
4. Click on **Import Items and close**. The grids from the tab Items are updated.

Management of Unique Identifiers for Items in the items grid:

- Any item must be uniquely identified by its code within each RFX round. When the RFX includes multiple pricing grids, the same item number cannot appear on more than one grid.
- Code unicity checks are run by the system during the creation, modification, and import of items, in order to avoid duplicate item codes.
- These checks affect only non-deleted (status 'del') items in the same round, and does not include items created by the supplier.
- During the creation/modification of an item, if a duplicate code is found, you will be prevented from saving the file and a warning message will pop up.
- During an import, numbers will automatically be appended to duplicate codes to make them unique. After the import is completed, a message gives the summary of imported/ignored lines.

## Step-by-Step Instructions for Setting Up an Item Grid for a Solicitation

Complete the item grid fields. Note that (V) indicates that a field will be visible to potential Bidders and/or Suppliers.

10

If necessary enter the **Code**, **Type**, **Label**, **Parent**, **Group(s)**, and/or **Commodity** and then click **Save**.



▲ To make a field mandatory for a Bidder and/or Supplier, right-click on the column header for the field you like to update and then select **Column Settings**. From the displayed pop-up window, click the **Required?** checkbox and then click **Save & Close**.

Continue to add items to the grid as necessary by selecting **Add an Item** from the **Actions** drop-down menu. You can use the **Preview** button to see what the item grids would look like to a Supplier.

Columns within an item grid can also be added or removed. To access the list of columns displayed, right-click the column header.

### Showing/Hiding Columns

11

In the contextual menu that can be accessed by right-clicking the column headers, all the columns for the pricing grid are shown. Where they are checked, they are visible on the pricing grid. When they are not checked, they are hidden. Those in grey are locked from the Show/Hide functionality. Note that choices here affect only the display. Hiding a column does not remove it from the grid. To remove a column from the grid, you need to delete it (use the Delete this column functionality in the same menu).

### Reordering the Columns

To reorder the columns, hover over the column's checkbox in the contextual menu. When your mouse cursor turns into a cross, hold down the left-click and drag the column to a new position in the list. The new column order will be mirrored in the grid.

To remove existing columns, toggle the **Radio Button** ( ☐ ) for that column header.

## Step-by-Step Instructions for Setting Up an Item Grid for a Solicitation

To add a new column, click **Add a column**.



- a) To add an existing column, select it in the **Column** field of the Select an existing column section.

- b) To create a new column (refer to the next 2 pages for details on these fields):

- 1) Select a **Column Type** from the available list.
- 2) Type in the column **Code**. (e.g., QTY for quantity, AMT for amount, etc.)
- 3) Type the name of the column in the **Label** field.
- 4) Select the user responsible in the **Column completed by** field.
- 5) Indicate whether completing the column should be required.
- 6) Click **Save & Close**.

- ▲ Users can optionally complete the **Tooltip** field to provide a description of the information that should be included in the column.
- ▲ On the **Analysis & Advanced Settings** users can optionally indicate how the data contained in this column should behave when exported to a pivot table.
- ▲ Calculated fields rely upon SQL logic that can be configured. Please submit a helpdesk ticket if you would like to establish a new calculated field in your item grid.

When you are finished setting up the item grid, click **Save & Close**.



## Step-by-Step Instructions for Setting Up an Item Grid for a Solicitation

### Setting up Column Properties

Type	Property	Description
All	Code	A unique identifier for the column (can be used to tag content in a MS Excel template if the named fields functionality refers to the code)
All	Order	Order defining the sorting of the columns
All	Label	Header title of the column
All	Type	Field type including: calculated, check box, date , drop down list, decimal, comment, attachment, RFx Form, Monetary amount, radio button, selector, text, yes/no field. The selected type determines which properties are available
All	Mandatory	Enable to render column mandatory. Un-filled mandatory columns will prevent proposal submission and data not saving. This property applies to all rows of all grids of the RFP that include this column.
All	Is axis convertible	Grid columns will be displayed in the Price Comparison table, in the Analyze RFP answers step. Enable this option if you want to be able to select this column as an analysis axis in the table.
All	Description	Free text describing the field
All	Visibility	Choose a visibility rule that will specify viewing properties
All	Fill Rule	Defines how sub-items are related to items
All	Map to	Links a column to data in an object and field selected (from requisition lines, contract terms, catalog items, etc.)
Checkbox, dropdown, radio button, or yes/no	Possible Values	Allows the buyer to set the list of values that the suppliers will select from in filling out the form/grid. Fill in and Save to show more blank fields to add more choices.
Decimal, Monetary amount, calculated	This column contains total value	Used to specify the final column to be used in comparing responses. This property may only be assigned to one column. This designates the awardee for proposal lines on the Analyze RFP responses step. This also designates the starting price for a future.

## Step-by-Step Instructions for Setting Up an Item Grid for a Solicitation

### Setting up Column Properties:

Type	Property	Description
Selector	Is item currency	Allows you to make the currency selectable by the supplier at item level (the proposal can be multi-currency)  To work properly, this option requires that the following properties be set on the column: Type = Selector , Selector = RFx currencies , Visibility = Supplier Response Field , Is item currency = enabled , Fill rule = Fill in main item only
Decimal, monetary amount, calculated	Size	Size of the field in number of characters
Decimal, monetary amount, calculated	Scale	Number of decimals
Calculated	For	Apply a calculation using the defined fields. The typical example is the total price field which multiplies the quantity by the unit price. In the formula, each column noted is referred to by their Code
Comment or Text	Size	Maximum size of field in number of characters
Selector	Selector	Choice of which pre-defined drop down list from the application database may be used

# SUBMIT A SOLICITATION FOR REVIEW AND APPROVAL

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
Creating and Preparing Solicitations					
Submit a Solicitation for Review and Approval	✓	✓	✓	✓	✓

---

## Overview

- What's Covered: The process for submitting a solicitation for review and approval in OhioBuys
- Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
- Used When: Preparing to submit a solicitation for review and approval

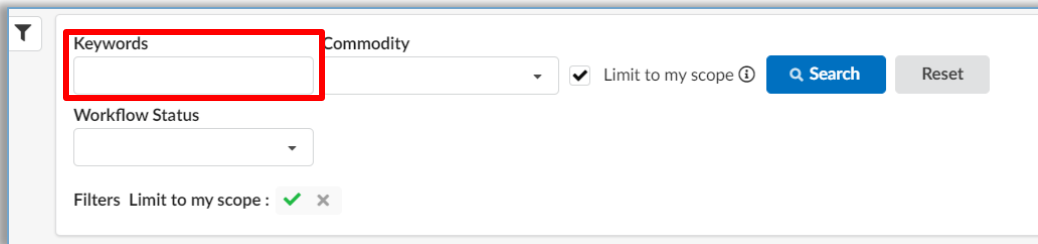
## Step-by-Step Instructions for Submitting a Solicitation for Review and Approval

1

Log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

2





The Sourcing Projects page is displayed. On this page, you can enter search terms to locate your solicitation. Enter search terms in the Keywords search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.



▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, RFx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** (🔍) icon.

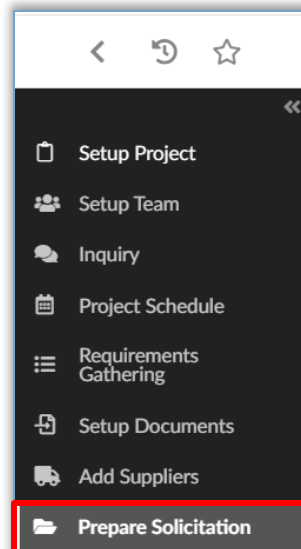
3

Open the sourcing project you would like to edit by clicking the **Pencil** (✎) icon.

Solicitation ID	Sourcing Project Name	Solicitation Type	Workflow Status	Commodity	Contracting Entity	Sourcing Step Shortcuts
✎ SRC0000000814	MWK Sourcing Project Test	Triple Envelope		• Livestock		   

4

Navigate to the **Prepare Solicitation** tab.



## Step-by-Step Instructions for Submitting a Solicitation for Review and Approval

5

Be sure to review the following aspects of the solicitation:

- 1) Project Team: Ensure that the appropriate users who will need to contribute to and/or approve the solicitation have been added properly.
- 2) Solicitation Documents: Ensure that all correct and necessary documents have been uploaded to the solicitation under the correct header.
- 3) Prepare Solicitation: Ensure that the correct dates have been selected for both the open and close period and the public posting period. Ensure that the closing end dates/times are during business hours so that issues can be resolved before bids are due. Review the Summary and Process fields to ensure that they contain enough detail. As a reminder, the Process field should outline the procedure that the State will use to determine who the contract will be awarded to. The Summary field should outline the details of the need at a high level that a potential Bidder or Supplier could understand at a glance and should include when the goods/services will be needed, ship-to address, and method of payment.. See examples below:

## Summary

①

The State is looking to expand its technological capabilities in the training and learning space. We are hoping to obtain a new virtual learning platform with which to engage our employees remotely when required.

## Process

The State will select the respondent that can provide a tool with at least 10 years of viability at the lowest cost and with an implementation duration of no more than 30 months.

If applicable, navigate to the questionnaire and questionnaire evaluation tabs to ensure that the correct questions are being asked, and the evaluation process has been set up correctly.

If applicable, review the item grid and ensure that preference fields are set up correctly.

- 4) Ensure that you have added all of the Bidders and/or Suppliers that you intend to invite to respond to the solicitation.

6

Click **Submit**. The solicitation will be routed to any approvers that have been assigned. If no approvers have been assigned, it is ready to be posted.

**Submit**[Return to  
Navigation Page](#)

# REVIEWING AND APPROVING SOLICITATIONS

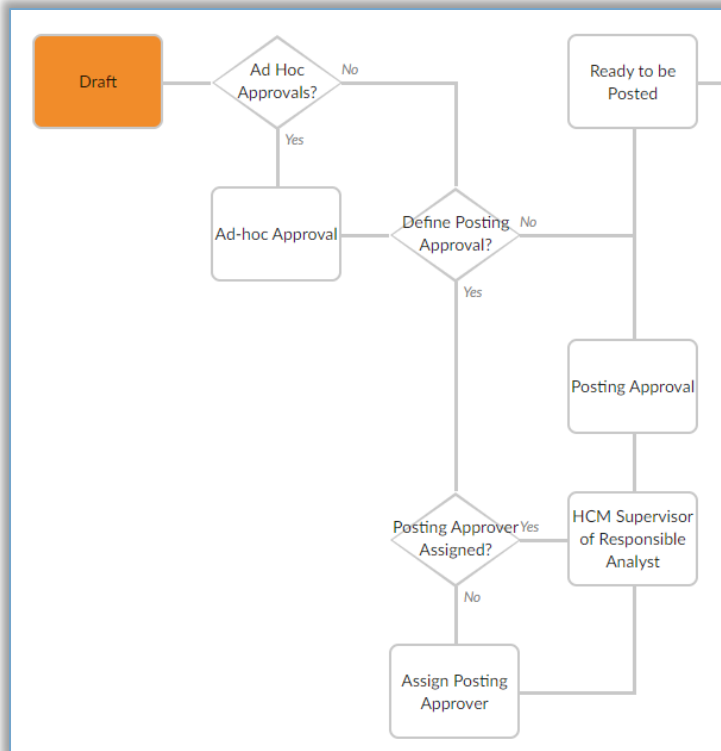
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## Topics

- Review and Approve a Solicitation
- Post a Solicitation
- Use the Sourcing Blog

# OhioBuys Solicitation Reviewer Roles

There are three main types of reviewers that may review and act on a solicitation in OhioBuys. These roles are primarily sourcing project specific roles that must be assigned by the person responsible for the solicitation when setting up their team.



1. **Ad-Hoc Approvers**: Ad-hoc approvers are optional approvers assigned to review a solicitation for a purpose relevant to that specific solicitation. If multiple ad-hoc approvers are added to a solicitation then all assigned approvers must approve for the solicitation to advance
2. **Posting Approvers**: Posting Approvers are optional approvers that review a solicitation prior to it being posted for Bidder and/or Supplier responses. If a Posting Approver is assigned, they will need to approve the solicitation prior to its release.
3. **HCM Supervisor**: If a Posting Approver's review is indicated, the responsible user's HCM Supervisor will also need to review and approve the solicitation prior to its release.

# REVIEW AND APPROVE A SOLICITATION

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
Reviewing and Approving Solicitations					
Review and Approve a Solicitation	✓	✓	✓	✓	✓

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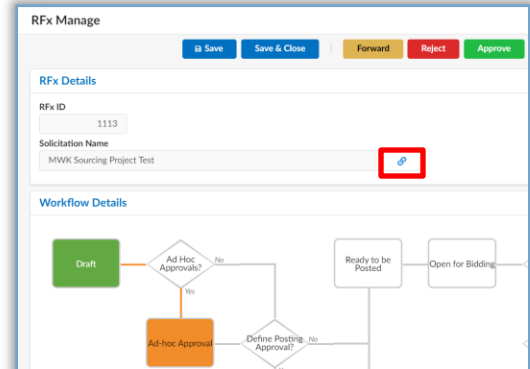
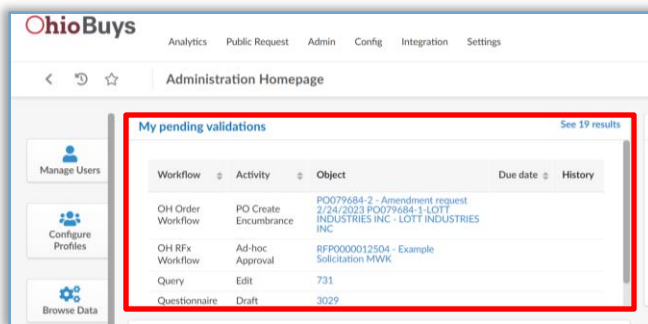
## Overview

- What's Covered: The process for reviewing and approving a solicitation for HCM Supervisors, Ad-hoc Approvers, and Posting Approvers in OhioBuys
  - Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
  - Used When: A solicitation requires review and approval before posting
- ▲ Note: Any role in OhioBuys may serve as a solicitation approver if they are set up for that role in the solicitation project team, or if they serve as an HCM supervisor to a user creating a solicitation



## Step-by-Step Instructions for Reviewing and Approving a Solicitation

Log in to OhioBuys. The My Pending Validations window on the OhioBuys homepage shows the most recent tasks that are awaiting your review. If desired, you can click on the **Object** hyperlink for any tasks that have an **Activity** of HCM Supervisor Approval, Ad-hoc Approval, or Posting Approval, to quickly view and take action on any solicitation needing your approval. Once you have found the task you would like to open, click on the **Object** name.



The workflow for the solicitation is displayed. Completed steps are green, while in progress steps are in orange. To access and review the solicitation in detail, click the **Link** (🔗) icon next to the Solicitation Name.

The sourcing project is displayed, open to the Setup Project tab. HCM Supervisors, Ad-hoc Approvers, and Posting Approvers all have the capability to review and update most components of the sourcing project.

▲ Note: the Project Type field is locked and cannot be adjusted. If this field needs to be updated, please reject the solicitation.

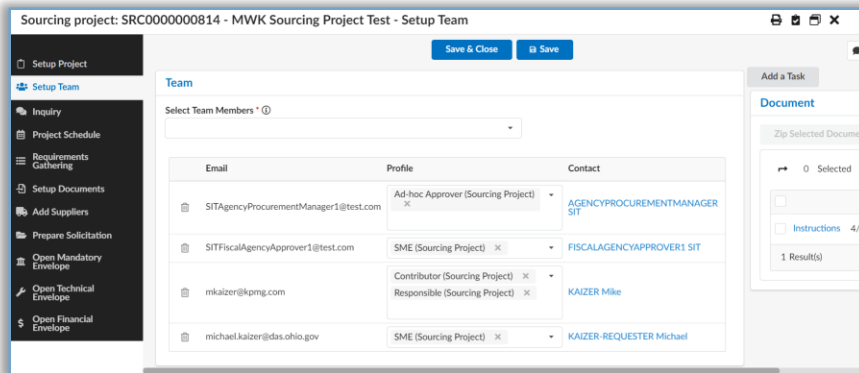
2

Review the details of the Setup Project tab and make any necessary updates. If you make any updates, click **Save**.

## Step-by-Step Instructions for Reviewing and Approving a Solicitation

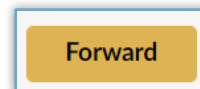
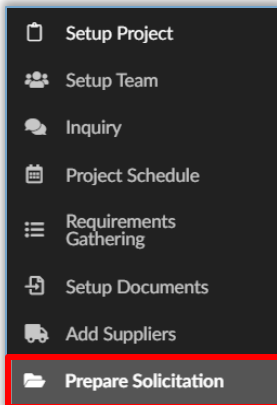
Navigate to the **Setup Team** tab. Review the team and ensure that the correct roles have been assigned to the appropriate users. If there are users who should be included on the team but have been omitted, reject the solicitation back to the Sourcing Responsible user with instructions on how to update the team.

- ▲ If you would like an additional approver to review the solicitation at the same step in the workflow that you are currently completing, you will need to Forward them the solicitation from the Prepare Solicitation tab. Note that users must be on the project team to be forwarded a solicitation.



3

- ▲ If you determine, based on the details of the solicitation, that an additional approver is required at your step in the workflow, navigate to the **Prepare Solicitation** tab and select the **Forward** button. All approver roles can forward a solicitation.



- ▲ Note that forwarding a solicitation allows either you (i.e., the person who was originally assigned this solicitation) or the person you forward it to to approve it, and that once either person approves it the solicitation will move on. Note, however, that the forwarded solicitation will be removed from the forwarding user's My Pending Validations.

## Step-by-Step Instructions for Reviewing and Approving a Solicitation

3

- ▲ If the intent is to make someone else aware of the solicitation, but not to formally approve it in the system, the non-approver will need to provide any feedback comments outside of OhioBuys.
- ▲ Select the user that you would like to forward the approval to from the dropdown menu. Then click **Forward**.
- ▲ Only users with who are listed on the Setup Team tab with the same role can be forwarded a solicitation.

Forward activity

Please select the user who should validate \*

Manager Procurement

See All

Forward Save & Close

Forward

Navigate to the **Setup Documents** tab.

Sourcing project: SRC0000000814 - MWK Sourcing Project Test - Setup Documents

Save & Close Save

General Documents

0 Selected Zip Selected Documents

Title	Contact	Last Modification (UTC-4)	Creation Date (UTC-4)	Validity End Date	Version
Independent Contractor Acknowledgement Form	ROBINSON Will	6/23/2020 6:35:48 PM	6/23/2020 6:35:48 PM		
Affirmation and Disclosure Form	ROBINSON Will	6/23/2020 6:23:43 PM	6/23/2020 6:23:43 PM		
State Terms and Conditions	ADMIN Clarity	6/16/2020 1:25:41 PM	6/17/2016 5:51:57 PM		

3 Result(s)

Sourcing Project Documents

Add a Task

Document

Zip Selected Documents

0 Selected

Instructions 4/

1 Result(s)

4

Review the various documents that have been added to the solicitation. Ensure that all of the documents you would expect to see based on your expertise are included in the solicitation.

Note that some documents contained on the Setup Documents tab will be posted publicly and others will not. The following document types will be posted publicly if they are contained in the Setup Documents tab:

- Public Proposals
- Public Evaluation Documents
- Public Solicitation Documents

▲ Note that **all** documents contained on the Prepare Solicitation tab will be posted publicly

If there are documents that should be included but have been omitted, or documents have been miscategorized, reject the solicitation back to the Sourcing Responsible user with instructions on which documents to upload.

## Step-by-Step Instructions for Reviewing and Approving a Solicitation

Navigate to the **Add Suppliers** tab.

Review the list of Suppliers to ensure it is accurate and complete. Note that there may be Suppliers not listed who will be notified, including all Suppliers who are set up to provide this commodity in OhioBuys.

5

- ▲ If Suppliers Notified has been set to Yes on the Prepare Solicitation tab, all Suppliers who are registered to provide the relevant commodity or commodities will be notified of the solicitation. (Note: this will be automatically checked to yes and cannot be edited at round 1)

- ▲ If the MBE Set Aside slider is engaged only MBE eligible Bidders and/or Suppliers will be invited to participate in the solicitation.
- ▲ In the case of a two-phase solicitation, be sure that the solicitation is tied to the correct Master Contract and that the appropriate Suppliers have been pulled down.

If there are Suppliers that should be specifically notified but have been omitted, or Suppliers that have been included and should not have been, reject the solicitation back to the Sourcing Responsible user with instructions on which Suppliers to add or remove.

## Step-by-Step Instructions for Reviewing and Approving a Solicitation

Navigate to the **Prepare Solicitation** tab. Within the Prepare Solicitation tab, there are a number of section headers containing different information to be reviewed.

- ▲ Note that depending on the project type, not all of the headers pictured below will be visible on a given solicitation.

Be sure to review the following headers within the Prepare Solicitation tab:

6

- a) Setup – Review the following sections of the Setup tab:

- 1) RFx Settings – Ensure that the correct RFx Type has been selected, the solicitation has been appropriately named, and that the Amendment Status is correctly set to Yes or No.

- 2) Open and Closure Dates

## Step-by-Step Instructions for Reviewing and Approving a Solicitation

- a) Setup (cont.) End dates/times during business hours so that issues can be resolved before bids are due.

**Inquiry Period** ⓘ

Inquiry Begin Date \*

3/23/2021 12:00:00 AM

Inquiry End Date \*

4/30/2021 12:00:00 PM

- 3) Inquiry Period Dates- End dates/times during business hours so that issues can be resolved before bids are due.

**Enable for Public Posting** ⓘ

Publication Begin Date

10/14/2020 12:00:00 PM

Publication End Date

10/21/2020 12:00:00 AM

- 4) Enable for Public Posting Dates – In general, Public Posting Dates should match your solicitation's Open and extend past the Closure dates. Please confirm your agency's specific policies with your Agency Admin.

**Commodity Suppliers**

Suppliers Notified ☒ Yes ☐ No

- 5) Commodity Suppliers – If set to Yes, all Suppliers who can provide the relevant commodity or commodities will be notified.

**Advanced Options**

- ☒ Publicly Post Opportunity
- ☒ Sealed bids
- ☒ Require suppliers to respond to RFx invitation
- ☒ The RFx must have at least one grid with an item
- ☒ Check the presence of a total column grid
- ☐ Suppliers answer in a form, not in a grid
- ☐ Suppliers can partially bid
- ☐ Reopen supplier proposals
- ☐ Buyers can create early contract documents

- 6) Advanced Options – Review and confirm that the correct options are checked or unchecked.

- ▲ Confirm the Publicly Post Opportunity box is set correctly based on the contents of the solicitation. Additionally, confirm that this is **deselected** if a new lot is being created to seek clarifications from a Bidder or Supplier who has already submitted a response.

## Step-by-Step Instructions for Reviewing and Approving a Solicitation

## a) Setup (cont.)

## Process

The State will select the respondent that can provide a tool with at least 10 years of viability at the lowest cost and with an implementation duration of no more than 30 months.

- 7) Process – Confirm that a sufficiently detailed description of the State's selection process has been provided. This will be visible publicly to interested Bidders and/or Suppliers.

## Summary

①

The State is looking to expand its technological capabilities in the training and learning space. We are hoping to obtain a new virtual learning platform with which to engage our employees remotely when required.

- 8) Summary – Confirm that a sufficiently detailed Summary of the need has been provided. This should provide interested Bidders and/or Suppliers with a high-level overview of the sourcing need they will be applying to fulfill with necessary information such as when the goods/services will be needed, ship-to address, and method of payment as appropriate.

- b) Documents – Note that all documents posted on the Prepare Solicitation tab will be available publicly to any interested Bidders and/or Suppliers.

Selected Lot - Round \*

Lot 1 - Round 1: MWRK Sourcing Project Test (Draft)

Setup Documents Financial Questionnaire Financial Evaluation Questionnaire Mandatory Questionnaire Confirm Invited Suppliers Mandatory Evaluation Questionnaire Workflow

Create a Document Attach Existing Document

0 Selected Zip Selected Documents

	Title	Type	Contact	Last Modification (UTC-4)	Creation Date (UTC-4)	Validity End Date	Version
<input type="checkbox"/>	State Terms and Conditions	RFx Commercial Documents (Approved)	AGENCYPROCUREMENTMANAGER SIT	6/17/2016 5:51:57 PM			
<input type="checkbox"/>	Affirmation and Disclosure Form	RFx Commercial Documents (Approved)	AGENCYPROCUREMENTMANAGER SIT	6/23/2020 6:23:43 PM			
<input type="checkbox"/>	Independent Contractor Acknowledgement Form	RFx Commercial Documents (Approved)	AGENCYPROCUREMENTMANAGER SIT	6/23/2020 6:35:48 PM			

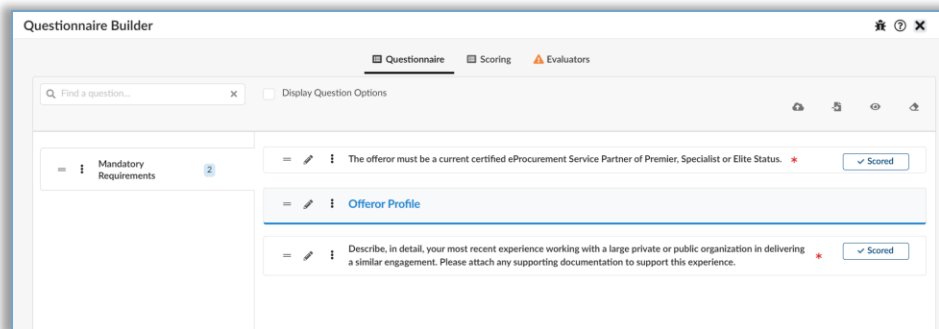
3 Result(s)

- ▲ The Documents posted on the Prepare Solicitation tab should be reviewed with heightened scrutiny as compared to those on the Documents tab, especially given that they will be disseminated to prospective Bidders and/or Suppliers.
- ▲ Confirm whether any **Early Contract Documents** have been added to the solicitation. These will appear below other documents in the Documents section of the Prepare Solicitation tab. For more information on Early Contract Documents, please refer to the Completing the Prepare Solicitation tab of this Learner Guide.

## Step-by-Step Instructions for Reviewing and Approving a Solicitation

## c) Questionnaire sections

- Financial Questionnaire/Financial Evaluation Questions – These questions address the Supplier's cost proposal to the State. (Only visible on Double and Triple Envelope solicitations)
  - Mandatory Questionnaire /Mandatory Evaluation Questions– These questions focus on the minimum base requirements that a Supplier must meet in order to be further considered for a solicitation. (Only visible on Triple Envelope Solicitations)
  - Technical Questions/Technical Evaluation Questions – These questions constitute the Supplier's technical proposal to address the needs of the State. (Only visible in Double and Triple Envelope solicitations)
  - Questionnaire/Evaluation Questionnaire – These generalized questionnaires function similarly to Technical Questions (Only visible in Single Envelope and Simple solicitations)
1. To view the Questions, scoring criteria, and assigned evaluators via the Questionnaire Builder click **Edit Questions & Scoring**.

2. To review the questions as the respondent will see them, click **Preview As Respondent**.



3. To review the questions as the assigned evaluators will see them, click **Preview As Evaluator**.



▲ For more information on all questionnaire types, please refer to the [Setup Mandatory, Technical and/or Financial Questionnaires for a Solicitation](#) section.



## Step-by-Step Instructions for Reviewing and Approving a Solicitation

- d) Items – The item grid tab displays the items that have been added for Bidders and/or Suppliers to respond to. If applicable, ensure that the correct columns have been added in order to evaluate preferences. (For more information please refer to the [Define Preference Factors for a Solicitation](#) and [Setup a Solicitation Item Grid](#) sections)

After you have made any necessary updates to the solicitation, navigate to the Prepare Solicitation tab and click the **Approve** button to approve it and advance the solicitation in the workflow.

Approve

If the solicitation requires additional edits from the user responsible for the sourcing project, click **Reject**.

Reject

- ▲ If you reject a solicitation, you will be asked to type the reason for the rejection in a pop-up comment box. This will be sent along with the solicitation back to the user responsible for the solicitation.

# POST A SOLICITATION

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
Reviewing and Approving Solicitations					
Post a Solicitation	✓	✓	✓	✓	✓

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## Overview

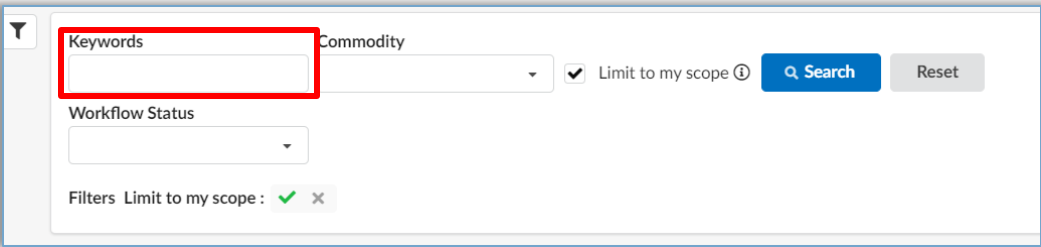
- What's Covered: The process for posting a solicitation in OhioBuys
- Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
- Used When: A solicitation is ready to be posted and sent to invited Bidders and/or Suppliers


Step-by-Step Instructions for Posting a Solicitation


1 Log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

The Sourcing Projects page is displayed. On this page, you can enter search terms to locate your solicitation. Enter search terms in the Keywords search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.






2



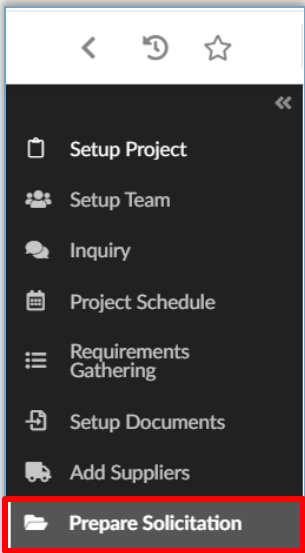
▲ You can also search for projects based on a variety of filters including Commodity, Workflow Status, Contact, Supplier, Contracting Entity, Participating Organizations, Index, RFx Type, Solicitation Status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** (  ) icon.

3 Open the sourcing project you would like to edit by clicking the **Pencil** (  ) icon.

4

Solicitation ID	Sourcing Project Name	Solicitation Type	Workflow Status	Commodity	Contracting Entity	Sourcing Step Shortcuts
 SRC0000000814	MWK Sourcing Project Test	Triple Envelope		Livestock		   

Navigate to the **Prepare Solicitation** tab.



## Step-by-Step Instructions for Posting a Solicitation

5

Click **Send**.

Send

Complete the following steps on the displayed pop-up window:

- Select the files you would like to attach to the invitation to bid email.
- Confirm the Bidder and/or Supplier list.
  - ▲ If a Supplier does not have a Supplier Contact in OhioBuys, you will need to deselect that Supplier by unchecking the checkbox to its left. You will need to contact the Supplier outside of OhioBuys.
- Revise the email **Subject** and **Text** as necessary. Be sure to check off **Send me a copy** as this will make it easier to copy and paste the message text for any emails to Bidders and/or Suppliers sent outside of OhioBuys.
- Click **Send and Close** to notify the selected Bidders and/or Suppliers and open the quick quote solicitation for responses. Note that once a quick quote is opened, it is also posted on the OhioBuys Public Portal.
  - ▲ This means the solicitation is visible to **all** Suppliers regardless of whether or not they were invited to participate.

6

RFx Custom table cloths

**A** Files to attach

☐ RFx documents ☐ Excel 97-2003 quotation form (xls) ☐ Excel 2007-2010 quotation form (xlsx)

☐ Questionnaire to Excel 97-2003 (xls) ☐ Questionnaire to Excel 2007-2010 (xlsx)

**B** Send to

Company Name	Sending modes	User
<input checked="" type="checkbox"/> NET PAC INTERNATIONAL LLC	Email	Add Supplier Contact(s) *
<input checked="" type="checkbox"/> BROWN ENTERPRISE SOLUTIONS LLC	Email	BROWN GEORGE
<input checked="" type="checkbox"/> ROBY SERVICES LTD	Email	SELEDGE MICHELLE

3 Result(s)

**C** Email

Subject: RFx Invitation Custom table cloths ☐ Send me a copy

Text: Dear Madam, Dear Sir,

## Step-by-Step Instructions for Posting a Solicitation

7

Click **OK** in both pop-ups that appear.

env01.ivalua.us says

Do you really want to notify selected suppliers ?

**OK** Cancel

env01.ivalua.us says

Do you want to open bidding period at the same time ?

**OK** Cancel

Once a solicitation is posted Suppliers will be able to access it from the public solicitation page. Before Suppliers are able to respond to the solicitation, they will be required to complete the following acknowledgement and then indicate if they will or will not bid. Supplier acknowledgements can be tracked on the View Solicitation Activity of a solicitation.

**Acknowledgement**

By clicking the below "I Agree", you are agreeing to the following:

1. If you are quoting against a contract in which you are a current supplier, the terms of that contract will apply.
2. If this solicitation includes terms and conditions, the terms of the solicitation will apply.
3. If this neither references a current contract nor includes terms and conditions attached to the solicitation, you are agreeing to the State Standard Terms and Conditions linked below.

**I Agree** Read State Terms & Conditions

**Receipt acknowledged on 5/27/2021 1:24:23 PM (UTC-4)**

To answer to this RFx, please confirm that you intend to bid.

☐ WILL BID: our intent is to respond to this RFx.

☐ NO BID: we will not be able to respond to this RFx.

Submit

## Step-by-Step Instructions for Sending Notices To Additional Bidders

The Inquiry tab of the solicitation has a “notice” message type that allows users send communications to external emails. Follow this process to send bid notification to additional bidders that do not have OhioBuys contacts. Note, this additional notice should occur shortly after posting the solicitation.

## Prep Stage

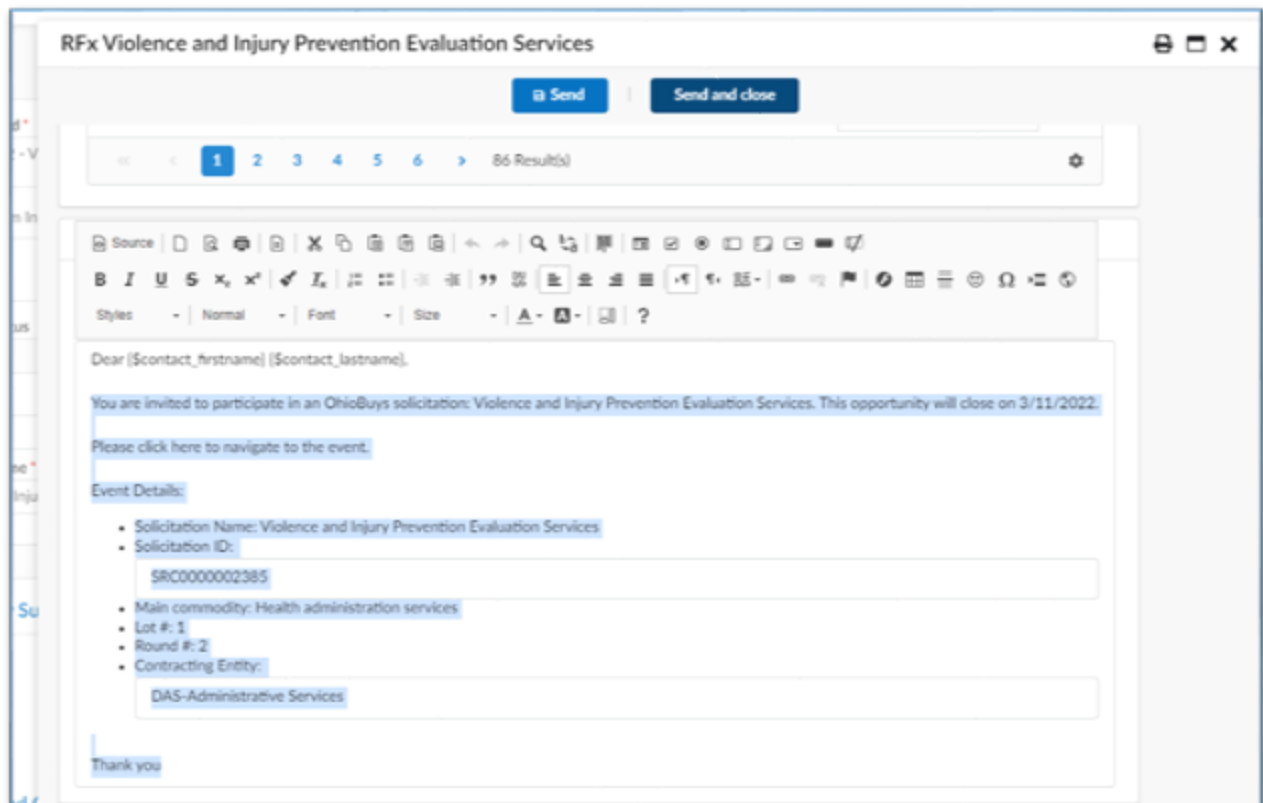
1. Gather the list of additional bidders.
2. Format all emails in a chain, separated by a semicolon (;). Do not use any spaces in between emails.

Ex. david.colopy@das.ohio.gov;randall.dublikar@das.ohio.gov;curtis.brooks@das.ohio.gov

3. Have this file open and available at the time you post your solicitation (will be copy & pasting this later)

## Posting

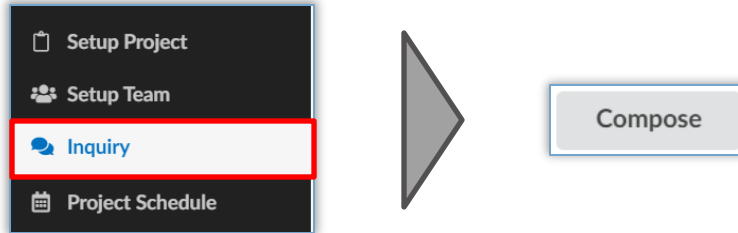
1. Approvals are obtained, posting dates are updated, and you are ready to advertise.
2. Click **Send**.
3. Scroll down on the popup to the language of the message. Copy the text of the message except for the heading (“Dear {\${contact\_firstname}} {\${contact\_lastname}}”)



4. Click **Send and Close**, along with confirming the two pop-ups for notifications and posting to the site.

## Step-by-Step Instructions for Posting a Solicitation

Navigate to the **Inquiry** tab and click **Compose**.



▲ Update the **Message Type** field to **Notice** by selecting it from the drop-down menu.

▲ In the Recipients field, select **Responsible – Sourcing project**.

▲ Enter the emails of the users you would like to invite in the **External Emails** field, separated by a “;” – note that you should not put a space between emails after the semicolon.

▲ Complete the **Subject** field and fill in the body of the message with the copied text from posting the solicitation. Note that if you did not copy the text from the initial notice (step 3 of Posting), you can retrieve the language from the View Solicitation Activity tab.

▲ Click **Send**.

A screenshot of the 'Compose' form. At the top, 'Message Type \*' is a dropdown menu with 'Notice' selected. To its right is a checkbox labeled 'Send me a copy'. Below this is a text area containing 'Price Alex'. Underneath is a section titled 'Send To' in blue. It contains two fields: 'Recipients \* ⓘ' (a dropdown menu) and 'External Emails ⓘ' (a text input field). Below these is the 'Subject \*' field, which is a text input area. At the bottom of the form, there is a link 'Click or Drag to add files', a green 'Send' button, and a red 'Cancel' button.

Your message will be delivered to the email addresses indicated informing them of the solicitation in OhioBuys. Note that prospective Bidders and/or Suppliers will need to register in OhioBuys in order to submit a response.

**Step-by-Step Instructions for Posting a Solicitation that is not Publicly Posted**

Alternative methods in OhioBuys to view and get a copy of the Solicitation Invitation email:

1. Click the View Solicitation Activity tab, click on the link in the Email column for one of the suppliers, from Sent Email screen click the email link under the Subject column to view and save a copy of the email.
2. Click the Workflow tab within the Prepare Solicitation tab, scroll down to Mail History section, click the email link in the Subject column for one of the suppliers, and view and save a copy of the email.



## Step-by-Step Instructions for Sending Notices To Additional Bidders

## Additional Bidder Notification:

1. The solicitation is now posted. Navigate to the **Inquiry** tab.
2. Click **Compose**.
3. Change the **Message Type** to *Notice*.
4. Select yourself as the recipient
5. Paste the text copied from step 3 above into the message text.
6. List the SRC Number and "Solicitation Notification" in the **Subject** field.
7. Add the list of additional bidder emails, formatted with no spaces & separated with a semicolon, and past into the external email box.

The screenshot shows the 'Compose' form in the OhioBuys system. At the top, 'Message Type' is set to 'Notice' with a dropdown arrow, and there is a checkbox for 'Send me a copy'. Below this is a text box containing 'Oswald James'. The 'Send To' section has two columns: 'Recipients' and 'External Emails'. Under 'Recipients', a dropdown menu is open showing '> Responsible (Sourcing Project)-OSWALD James' with an 'X' icon. Under 'External Emails', a text box contains 'david.colopy@das.ohio....'. The 'Subject' field is highlighted with a blue border and contains 'SRC2385 Solicitation Notification'. Below the subject field is a preview of the message content, which includes an invitation to participate in a solicitation, a link to the event, and a list of event details.

Message Type \*  
Notice ▾ ☐ Send me a copy

Oswald James

**Send To**

Recipients \* ⓘ  
> Responsible (Sourcing Project)-OSWALD James X

External Emails ⓘ  
david.colopy@das.ohio....

Subject \*  
SRC2385 Solicitation Notification

You are invited to participate in an OhioBuys solicitation:  
Violence and Injury Prevention Evaluation Services. This opportunity will close on 3/11/2022.

Please [click here](#) to navigate to the event.

Event Details:

- Solicitation Name: Violence and Injury Prevention Evaluation Services
- Solicitation ID: SRC0000002385
- Main commodity: Health administration services
- Lot #: 1
- Round #: 2
- Contracting Entity: DAS-Administrative Services

8. Click **Send**.

If you do not copy the text from the initial notice (step 3 of Posting), you can retrieve the language from the View Solicitation Activity tab.

# MANAGING SOLICITATIONS

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## Topics

After a solicitation is posted in OhioBuys, agency users can:

- Create and Issue New Lots and Rounds
- Review Sourcing Activity
- Answer Supplier Questions

# CREATE AND ISSUE NEW LOTS AND ROUNDS

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
Managing Solicitations					
Create and Issue New Lots and Rounds	✓	✓	✓	✓	

---

## Overview

- What's Covered: The process for creating new lots and rounds for a solicitation OhioBuys
- Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
- Used When: A solicitation takes place over the course of multiple lots or rounds

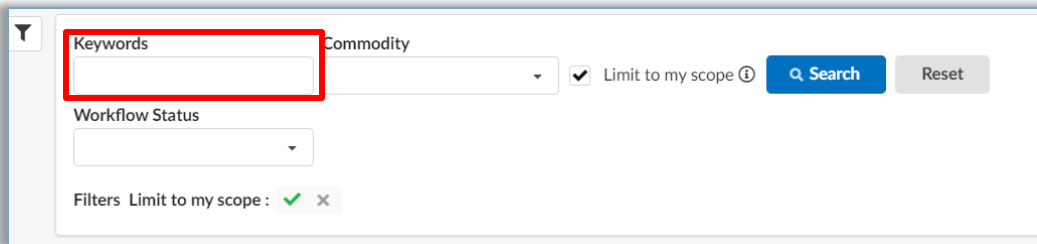
## Step-by-Step Instructions for Creating and Issuing New Lots and Rounds


1

Log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

2






The Sourcing Projects page is displayed. On this page, you can enter search terms to locate your solicitation. Enter search terms in the Keywords search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.



▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, RFx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** (  ) icon.

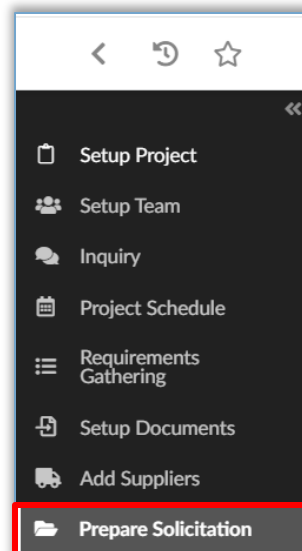
3

Open the sourcing project you would like to edit by clicking the **Pencil** (  ) icon.

Solicitation ID	Sourcing Project Name	Solicitation Type	Workflow Status	Commodity	Contracting Entity	Sourcing Step Shortcuts
 SRC0000000814	MWK Sourcing Project Test	Triple Envelope		• Livestock		   

4

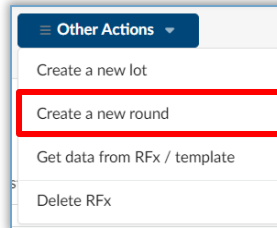
Navigate to the **Prepare Solicitation** tab.



## Step-by-Step Instructions for Creating and Issuing New Lots and Rounds

Click **Other Actions** and select either **Create a new lot** or **Create a new round**.

▲ Once you have selected which you would like to create, the process for creating a new lot or round is the same.



If necessary, update the **Commodity** or the **Organization**. These fields both carry over from the original sourcing project.

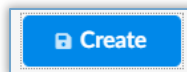
Commodity	Organization	Search	Reset
10101500 - Livestock	DRC-Dept of Rehab & Corrections	Q Search	Reset

Confirm the options that should carry over from the original RFx. You can also choose to leave a section blank, or populate the section with the default from the RFx type.

Choose what to copy	Blank	Default from RFx Type	Copy from selected RFx
Setup Tab	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Item Columns	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Questionnaire	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Documents	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

▲ Note that the **Setup Tab** selector will determine whether or not the Advanced Options from the original RFx carry over. Users should carefully consider whether to retain this field.

Click **Create**.



Click **Continue**.

**Warning**

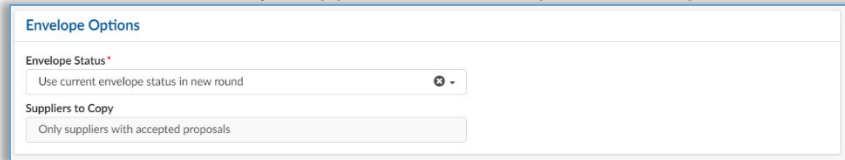
Do you really want to apply these changes ?

- 15 columns will be added.
- 1 questions will be added.
- 3 documents will be added.

Cancel Continue

## Step-by-Step Instructions for Creating and Issuing New Lots and Rounds

Note that when creating a new round for a double or triple envelope solicitation, the sourcing responsible can elect to copy over the envelope status from the previous round or un-validate the envelopes, and can choose to include only Suppliers with accepted envelopes or all invited Suppliers.



**Envelope Options**

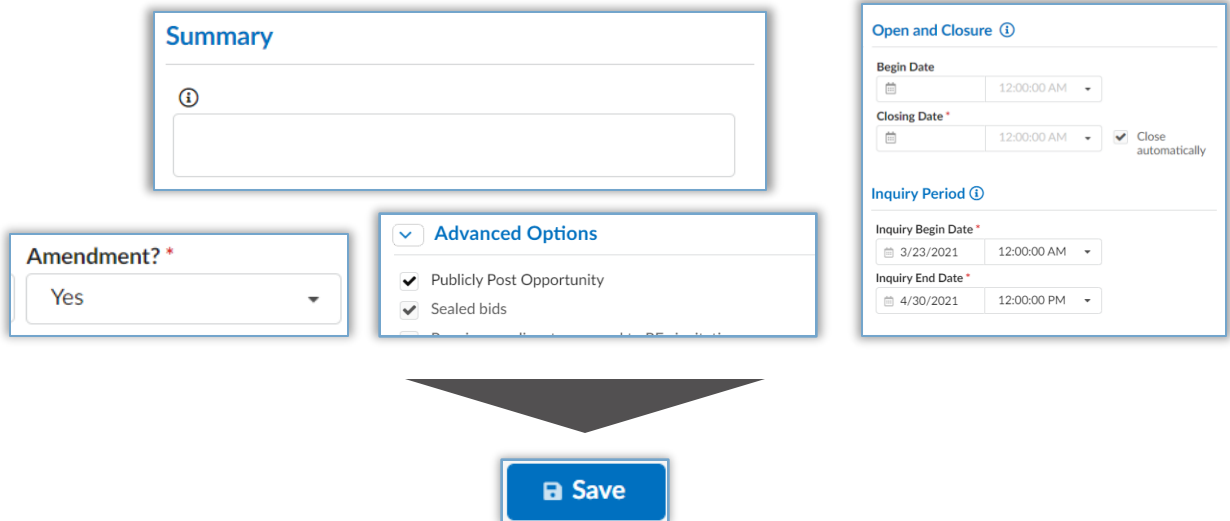
Envelope Status \*

Use current envelope status in new round

Suppliers to Copy

Only suppliers with accepted proposals

A new lot or round has been created. Enter the reason for the new lot or round in the **Summary** field and make any necessary updates to the Open & Closure and Inquiry Dates. Update the **Amendment** field to Yes or No depending on the reason the new round is being created. In the **Advanced** Options section, if you are posting clarifications be sure that the **Publicly Post Opportunity** checkbox is unchecked. Then click **Save**.



**Summary**

**Amendment? \***

Yes

**Advanced Options**

☒ Publicly Post Opportunity

☒ Sealed bids

**Open and Closure ⓘ**

Begin Date

12:00:00 AM

Closing Date \*

12:00:00 AM

☒ Close automatically

**Inquiry Period ⓘ**

Inquiry Begin Date \*

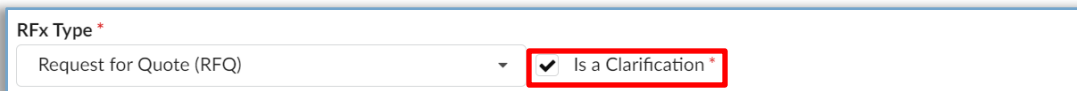
3/23/2021 12:00:00 AM

Inquiry End Date \*

4/30/2021 12:00:00 PM

**Save**

- ▲ Note that if you are creating a new lot, you should indicate whether or not the lot is a clarification using the **Is a Clarification** checkbox.
- ▲ If the lot is a clarification, the Sourcing Responsible user is able to manually close the solicitation prior to the scheduled close date once clarifications have been received
- ▲ If the Inquiry Begin Date is not populated by the user, it will automatically match the solicitation posting date once the solicitation is open for bidding. However, users must always manually input the Inquiry End Date.
- ▲ If not populated by the user, the Publication Begin Date will automatically populate to match the Begin Date of the solicitation, and Publication End Date will automatically populate with a date one year after the solicitation closing date.
- ▲ If not populated by the user, the Publication Begin Date will automatically populate to match the Begin Date of the new round, and Publication End Date will automatically populate with a date one year after the round closing date.



RFx Type \*

Request for Quote (RFQ)

☒ Is a Clarification \*

## Step-by-Step Instructions for Creating and Issuing New Lots and Rounds

11

Navigate to the **Documents** tab and upload any new amendment documents.

The screenshot shows the 'Documents' tab selected in the navigation bar. Below the navigation bar, there are two buttons: 'Create a Document' and 'Attach Existing Document'. Below these buttons is a table with columns: Title, Type, Contact, Last Modification (UTC-4), Creation Date (UTC-4), Validity End Date, and Version. The table contains three rows of documents, all of which are 'RFx Commercial Documents (Approved)' and are associated with 'KAIZER Mike'.

Title	Type	Contact	Last Modification (UTC-4)	Creation Date (UTC-4)	Validity End Date	Version
State Terms and Conditions	RFx Commercial Documents (Approved)	KAIZER Mike		6/17/2016 5:51:57 PM		
Affirmation and Disclosure Form	RFx Commercial Documents (Approved)	KAIZER Mike		6/23/2020 6:23:43 PM		
Independent Contractor Acknowledgement Form	RFx Commercial Documents (Approved)	KAIZER Mike		6/23/2020 6:35:48 PM		

12

Navigate to the **Confirm Invited Suppliers** tab and select the Suppliers you wish to include in the new lot or round.

The screenshot shows the 'Confirm Invited Suppliers' tab selected in the navigation bar. Below the navigation bar, there is a list of suppliers with checkboxes. The list includes 'Invited Suppliers', '3M COMPANY', and 'IBM GLOBAL SERVICES'. All three are checked.

Supplier	Selected
Invited Suppliers	<input checked="" type="checkbox"/>
3M COMPANY	<input checked="" type="checkbox"/>
IBM GLOBAL SERVICES	<input checked="" type="checkbox"/>

13

Continue to update the solicitation as necessary to capture the details of the new lot or round. When you are finished, click **Submit**.

▲ Please note that issuing a new round or new lot will retrigger the solicitation approval workflow.

▲ Note that if a new lot or round is issued, Suppliers will need to resubmit their responses. Please ensure that this is communicated clearly to your participating Suppliers as appropriate. For instructions on how to quickly resubmit a response, please direct Suppliers to the Viewing and Responding to Solicitations Learner Guide.

# REVIEW SOURCING ACTIVITY

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
Managing Solicitations					
Review Sourcing Activity	✓	✓	✓	✓	

---

## Overview

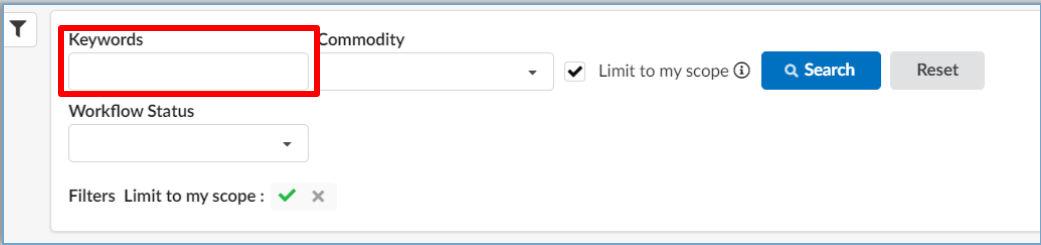
- What's Covered: The process for reviewing sourcing activity in a solicitation in OhioBuys
- Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
- Used When: Reviewing Supplier activity on a solicitation they have been invited to and/or are participating in





Step-by-Step Instructions for Reviewing Sourcing Activity






1 Log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

2 The Sourcing Projects page is displayed. On this page, you can enter search terms to locate your solicitation. Enter search terms in the Keywords search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

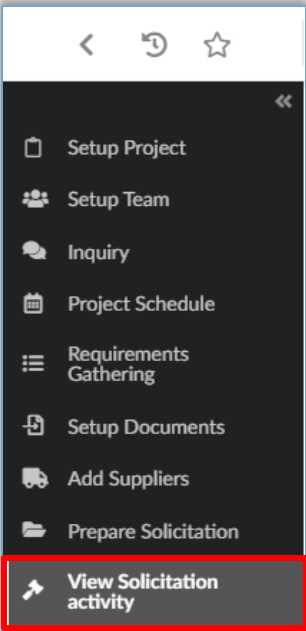


▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, RFx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** (  ) icon.

3 Open the sourcing project you would like to edit by clicking the **Pencil** (  ) icon.

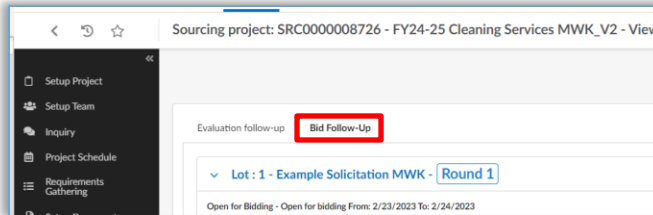
Solicitation ID	Sourcing Project Name	Solicitation Type	Workflow Status	Commodity	Contracting Entity	Sourcing Step Shortcuts
 SRC0000000814	MWK Sourcing Project Test	Triple Envelope		• Livestock		   

4 Navigate to the **View Solicitation Activity** tab.



## Step-by-Step Instructions for Reviewing Sourcing Activity

Navigate to the **Bid Follow-Up** section of the View Solicitation Activity tab.



Invited and participating Bidders and/or Suppliers' activity on the solicitation is displayed. The activity from different Suppliers is divided on the page according to the lots or rounds of the solicitation.

Supplier	Email	Logins	Last login (UTC-5)	NDA	Invitation Acknowledged	Submitted Proposals	Declined	Status	Comment
GOODWILL INDUSTRIES OF NORTHWEST	2	1	2/24/2023 2:51:49 PM			1	<input type="checkbox"/>	Authorized (●)	
I Can Do It! Learning Center	2	1	2/24/2023 2:41:19 PM			1	<input type="checkbox"/>	Authorized (●)	
#1 Supply & Rental LLC	2	1	2/24/2023 2:44:42 PM			1	<input type="checkbox"/>	Authorized (●)	

Bids are sealed until 2/24/2023 3:00:00 PM

- a) **Email:** Indicates the number of emails that have been sent to the Bidder or Supplier in regard to the solicitation.
- b) **Logins:** Indicates the number of times that the Bidder or Supplier has logged into OhioBuys since being invited to the solicitation.
- c) **Last Login:** Indicates the last time that the Bidder or Supplier logged into OhioBuys since being invited to respond to the solicitation.
- d) **Submitted Proposals:** Indicates how many proposals the Bidder or Supplier has submitted in a given lot or round.
- e) **Declined:** A checkbox that, if checked, indicates that a Bidder or Supplier has declined to respond to the solicitation.
- f) **Status:** By default, indicates that the invited or participating Bidder or Supplier is authorized to participate in the solicitation. Users are able to click the **Authorized** (●) icon and choose to block a Supplier if appropriate. To reverse this decision, click the **Blocked** (⊗) icon that appears in its place.
- g) **Comment:** Displays any comments associated with the Bidder or Supplier's response.
- h) **MBDD Status:** Displays whether or not the Bidder or Supplier is registered as an MBE, VBE, or EDGE Supplier.

# ANSWER SUPPLIER QUESTIONS

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
Managing Solicitations					
Answer Supplier Questions	✓	✓	✓	✓	✓

## Overview

- What's Covered: The process for responding to Bidder and/or Supplier questions in the Inquiry section of a solicitation in OhioBuys
- Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
- Used When: Replying to Bidder or Supplier inquiry about a solicitation in OhioBuys

## Step-by-Step Instructions for Answering Supplier Questions

▲

When a Bidder or Supplier submits an inquiry, the user responsible for the solicitation will receive an email notification and can view the question. They then can "unlock" the question for edit by forwarding. They can forward to any teammate on the team.

1

Log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

2

The Sourcing Projects page is displayed. On this page, you can enter search terms to locate your solicitation. Enter search terms in the Keywords search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

Keywords: [Red Box] Commodity: [Dropdown] [Limit to my scope] [Search] [Reset]

Workflow Status: [Dropdown]

Filters: Limit to my scope: [Green Checkmark] [X]

▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, RFx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** (⌵) icon.

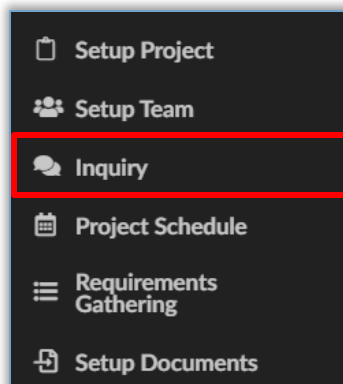
3

Open the sourcing project you would like to edit by clicking the **Pencil** (✎) icon.

Solicitation ID	Sourcing Project Name	Solicitation Type	Workflow Status	Commodity	Contracting Entity	Sourcing Step Shortcuts
✎ SRC0000000814	MWK Sourcing Project Test	Triple Envelope		• Livestock		[Icons: Search, Print, Share, etc.]

4

Navigate to the **Inquiry** tab.



## Step-by-Step Instructions for Answering Supplier Questions

5

The Inquiries page is displayed. Users are able to search for specific questions using keywords. Click anywhere on a question line to open it.

**Inquiries**

Keywords:  **Q Search** **Reset** **Advanced search**

Display:

**Compose** **Message History**

Subject	Messages	Last update (UTC-4)	Original sender	Last sender	Publicly Posted
Question	0 / 2	8/3/2020 11:00:35 PM	KYLE BAILEY	KYLE BAILEY	<input checked="" type="checkbox"/>
Question	0 / 1	8/3/2020 10:59:54 PM	KYLE BAILEY	KYLE BAILEY	<input type="checkbox"/>
Question	0 / 1	8/3/2020 10:58:20 PM	Dipan KARUMSI (KPMG LLP)	Dipan KARUMSI (KPMG LLP)	<input type="checkbox"/>
Public Portal Config	0 / 1	8/3/2020 10:56:35 PM	Will ROBINSON (KPMG LLP)	Will ROBINSON (KPMG LLP)	<input type="checkbox"/>

6

The question is displayed. To respond to the question, a user must first click the **Forward** (↩) icon.

↩ Careworks Kurt (CARE... ↩ ✓

**Send To**

**Recipients**

Responsible (Sourcing Project)-  
TRAINING  
DASContractAnalyst25,

Does the State have a preferred training development software that we should use for this project? (e.g., Articulate 360 or Captivate 2019).

## Step-by-Step Instructions for Answering Supplier Questions

7

Update the **Message Type** to **Public Response**. Doing so will post the Supplier's question publicly so that other Suppliers are able to see the State's response. The user should then select themselves in the **Recipients** field.

The screenshot shows a form titled 'Message Type \*'. The 'Message Type' dropdown is set to 'Public Response'. To the right is a checkbox labeled 'Send me a copy'. Below this is a text field containing 'Training DASContractAnalyst25'. The 'Send To' section has two dropdowns: 'Recipients \* ⓘ' and 'External Emails ⓘ'. The 'Subject \*' field contains 'Training Software?'. Below the subject is a text area with the question: 'Does the State have a preferred training development software that we should use for this project? (e.g., Articulate 360 or Captivate 2019)'. At the bottom are three buttons: 'Click or Drag to add files', 'Send', and 'Cancel'.

- ▲ Clean up the Supplier's question by removing any sensitive or identifying information, as well as correcting any mistakes in spelling or grammar. This will ensure that the question is clear when it is posted to the public.

Once the Supplier's question has been cleaned up, click **Send**.

8

Navigate to the forwarded message and click the **Reply** (↩) icon.

The screenshot shows a message titled 'Training Software?' with a 'Public Response' status. It features a 'Reply' icon (a red square with a white arrow) and a timestamp of '10/9/2020 11:16:28 AM'. The 'Send To' section has a 'Recipients' dropdown set to 'Responsible (Sourcing Project)'. The subject is 'Training Software?' and the text area contains the same question as in the previous screenshot: 'Does the State have a preferred training development software that we should use for this project? (e.g., Articulate 360 or Captivate 2019)'.

## Step-by-Step Instructions for Answering Supplier Questions

Ensure that the **Message Type** is set to Public Response. Indicate the **Recipients** of the response. You can choose both internal contacts on the project team and Supplier contacts.

9

Training Software? Public Response

☐ Send me a copy

Training DASContractAnalyst25

**Send To**

Recipients \* ⓘ

> Responsible (Sourcing Project)-  
TRAINING DASContractAnalyst25 x

External Emails ⓘ

The State uses Captivate 2019.

Click or Drag to add files

Send Cancel

▲ Select **All internal team members** to send a reply to all users in the team tab.

Type the details of your response in the free text entry field.

10

When you are ready, click **Send** to distribute your reply.

Send

11

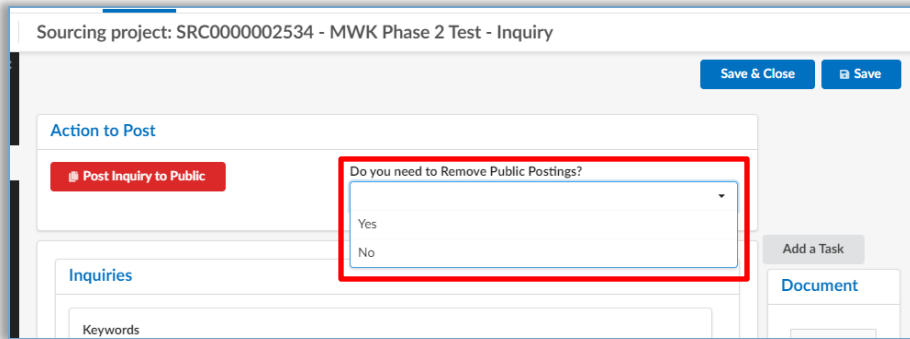
Click **Save** and then click **Post Inquiry to the Public**. This will post publicly all of the questions and answers with the public response type.

Post Inquiry to Public

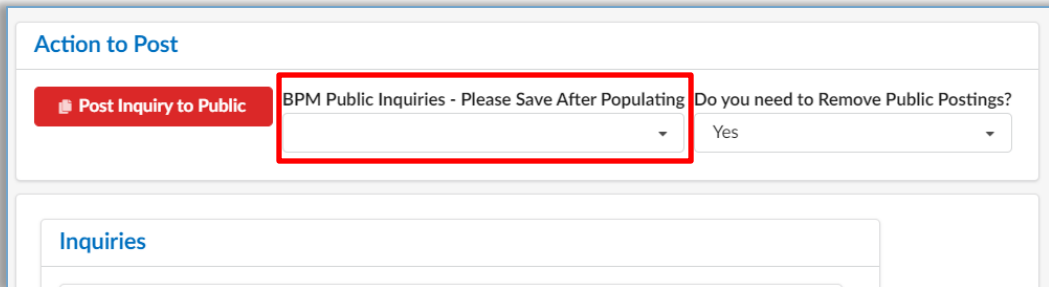
## Step-by-Step Instructions for Answering Supplier Questions

Inquiry responses that have been posted to the public can be removed if required.

- 1) In the **Do you need to remove public postings** drop-down menu, select **Yes**.



- 2) A new **BPM Public Inquiries** drop-down will appear. Select the post(s) that you want to remove from the drop-down menu.



- 3) Click **Save**.



- 4) Click **Remove Public Posting**.





# CANCEL A SOLICITATION

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
Managing Solicitations					
Cancel a Solicitation	✓	✓	✓	✓	✓

---

## Overview

- What's Covered: The process for cancelling a solicitation in OhioBuys
- Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
- Used When: A user would like to cancel a solicitation in OhioBuys

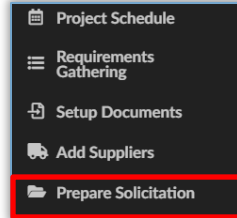
### Step-by-Step Instructions for Cancelling a Solicitation

▲

If a solicitation needs to be cancelled, the user responsible for the solicitation must do so by creating a new round and utilizing the *Cancellation* RFx type.

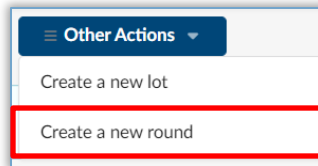
1

Open the sourcing project that you intend to cancel in OhioBuys and navigate to the **Prepare Solicitation** tab.



2

Click on the **Other Actions** drop-down menu and select **Create a New Round**.



3

Click **Save & Close** to make a new round.

A screenshot of the 'Round / Lot copy' form in OhioBuys. The form has a header with 'Round / Lot copy' and a close button. Below the header are two buttons: 'Create' and 'Save & Close'. The 'Save & Close' button is highlighted with a red rectangular box. Below the buttons are two dropdown menus: 'Commodity' (24101629 - Forklift or elevator accessories or supplies) and 'Organization' (BWC300920 Delivery Services BWCW). To the right of these dropdowns are 'Search' and 'Reset' buttons. Below the dropdowns is a table with columns: RFx Type, Lot #, Round #, Solicitation Name, Begin Date, End Date, and Solicitation Status. The table contains one row: Quick Quote, 1, 1, Battery, model 18-85-11 for Toyota forklift/BWC220310, 9/20/2021, 10/4/2021, Open for Bidding. Below the table is a 'Copy Options' section with the text 'Choose what to copy'. It contains a table with columns: Blank, Default from RFx Type, and Copy from selected RFx. The table has three rows: Setup Tab, Item Columns, and Items. The 'Copy from selected RFx' column has radio buttons selected for all three rows.

## Step-by-Step Instructions for Cancelling a Solicitation

Click **Continue** to apply changes.

Warning

Do you really want to apply these changes ?

- 16 columns will be added.
- 1 items will be added.

Cancel Continue

Update the **RFx Type** field to **Cancellation** and update the **Amendment** field to **Yes**.

RFx Type \*  
Cancellation

Solicitation Name \*  
MWK OOD Learning Lab Example Test

Lot # ⓘ Round # ⓘ Amendment? \*  
1 2 Yes

Set the **Begin Date** to some point in the future. (i.e., if it is 1/1/2021 at 12:00:00 PM, the date must be at least 1/1/2021 at 12:01:00 PM) and set the **Closing Date** to some time after the **Begin Date**. Write any public notes associated with the cancellation in the **Summary** field and click **Save**.

Open and Closure ⓘ

Begin Date  
9/30/2021 12:00:00 AM

Closing Date \*  
10/8/2021 12:00:00 AM

Summary

ⓘ

Click **Submit**.

Save & Close Save Forward Submit Validate Other Actions

Click **Send**.

Save & Close Save Reject Send Other Actions

## Step-by-Step Instructions for Cancelling a Solicitation

Ensure all Suppliers listed in the pop-up screen have a Supplier Contact selected. If the supplier contact for a supplier is not listed, then click the **Checkbox** icon next to that given supplier to exclude them from receiving an email notification.

Click **Send and Close**.

9

10

Click **OK** to send the cancelation notification to suppliers.

11

Click **Begin Evaluation** to push the solicitation into the cancelled status.

## Step-by-Step Instructions for Cancelling a Solicitation

If a solicitation needs to be cancelled but the user responsible for the solicitation encounters system limitations, the user may need to take an alternate route to cancel the solicitation.

In this situation, users should leverage the "Fax" sending mode where an email notice is not sent directly to the suppliers but instead an automated workflow generated notification is sent to notify suppliers of the solicitation cancellation.

Users should also manually update the notification and make the following updates to the before sending out:

- Change the Subject from "FYI – New Public RFx" to "FYI – RFx Cancellation"
- Include the solicitation ID number in the body of notification.

Other language or wording may need to be modified within the notification as well depending on the reasoning for the cancelation.

# ANALYZING AND AWARDING SOLICITATIONS

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## Topics

- Open Solicitation Responses
- Review Bidder Submitted Responses and Attachments
- Complete Response Evaluations (Simple/Single Envelope)
- Complete Response Evaluations (Double/Triple Envelope)
- Analyze Submitted Bids
- Create Award Scenarios and Award a Solicitation
- Award a Solicitation

The process for analyzing and awarding a solicitation will vary depending on the solicitation type. The process for most types of solicitations will take place directly in OhioBuys and is documented in the following pages. However, in the case of a Public Notice solicitation, the solicitation analysis and awarding will take place outside of OhioBuys.

# OPEN SOLICITATION RESPONSES

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
Analyzing and Awarding Solicitations					
Open Solicitation Responses	✓	✓	✓	✓	

---

## Overview

- What's Covered: The process for certifying and opening Bidder and/or Supplier responses to solicitations in OhioBuys
- Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
- Used When: Reviewing responses to a solicitation

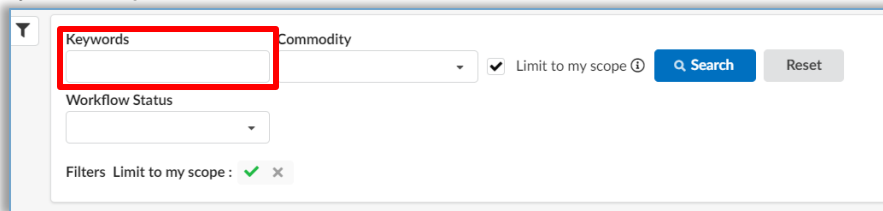
## Step-by-Step Instructions for Opening Solicitation Responses

1

After the response date closes, solicitations can be evaluated. Log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

2





The Sourcing Projects page is displayed. On this page, you can enter search terms to locate your solicitation. Enter search terms in the Keywords search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.



▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, RFx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** (⌵) icon.

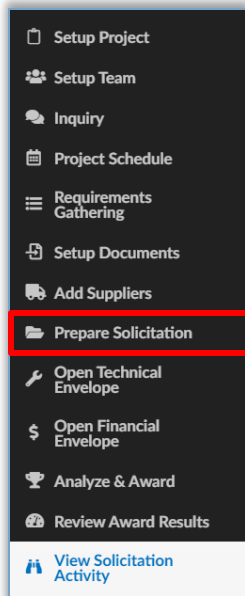
3

Open the sourcing project you would like to edit by clicking the **Pencil** (✎) icon.

Solicitation ID	Sourcing Project Name	Solicitation Type	Workflow Status	Commodity	Contracting Entity	Sourcing Step Shortcuts
✎ SRC000000814	MWK Sourcing Project Test	Triple Envelope		• Livestock		   

4

Navigate to the **Prepare Solicitation** tab and click **Begin Evaluation** to start the response evaluation process.

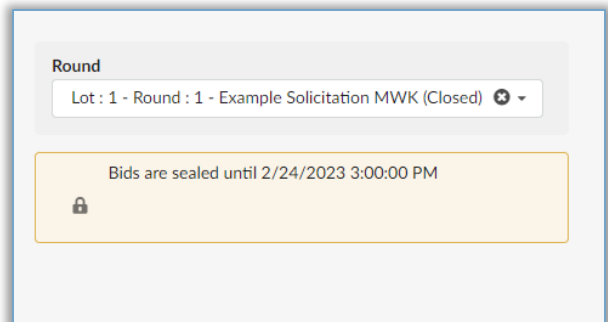
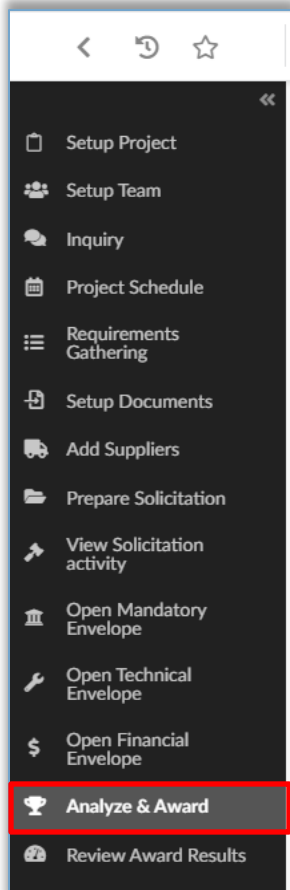
**Begin Evaluation**



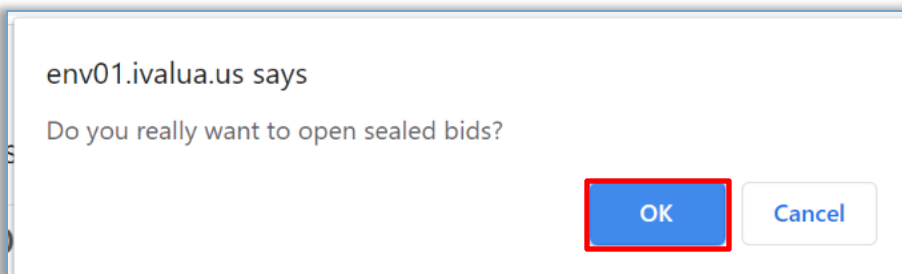
## Step-by-Step Instructions for Opening Solicitation Responses

Prior to opening solicitation responses, all DAS Office of Procurement Services, DAS Office of State Printing and Mail Services, and BWC solicitations will be submitted to the Auditor of State for certification. Prior to certification, the user responsible for the solicitation will be unable to unseal solicitation responses. Once certified by the Auditor of State, the individual who is responsible for the solicitation will receive an email notification notifying them the responses can be unsealed

Navigate to the **Analyze and Award** tab and click the **Lock** (🔒) icon to unseal the bids.



Click **OK** in the pop-up window to unseal the bids.



# REVIEW BIDDER/SUPPLIER SUBMITTED RESPONSES AND ATTACHMENTS

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
Analyzing and Awarding Solicitations					
Review Bidder/Supplier Submitted Responses and Attachments	✓	✓	✓	✓	

## Overview

- What's Covered: The process for reviewing responses and attachments submitted for OhioBuys solicitations
- Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
- Used When: Reviewing responses to a solicitation

### Step-by-Step Instructions for Reviewing Bidder/Supplier Responses and Attachments

1

Log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

2

The Sourcing Projects page is displayed. On this page, you can enter search terms to locate your solicitation. Enter search terms in the Keywords search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, RFx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** (⌵) icon.

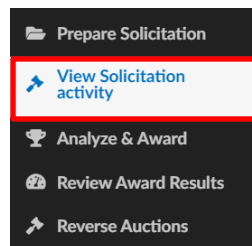
3

Open the sourcing project you would like to edit by clicking the **Pencil** (✎) icon.

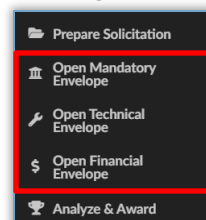
Solicitation ID	Sourcing Project Name	Solicitation Type	Workflow Status	Commodity	Contracting Entity	Sourcing Step Shortcuts
✎ SRC0000000814	MWK Sourcing Project Test	Triple Envelope		• Livestock		🔍 📄 👤 💬

4

a) For a **Single Envelope** or a **Simple** solicitation, navigate to the **View Solicitation Activity** tab.



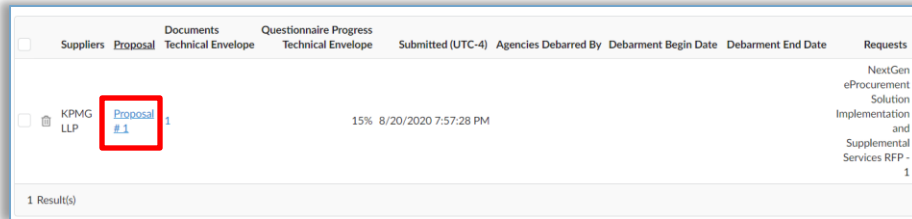
b) For a **Double** or **Triple Envelope** solicitation, first navigate to the **Open Mandatory Envelope**, then **Open Technical Envelope**, or **Open Financial Envelope** tab as appropriate. Note that they must be reviewed in the above order.



### Step-by-Step Instructions for Reviewing Bidder/Supplier Responses and Attachments

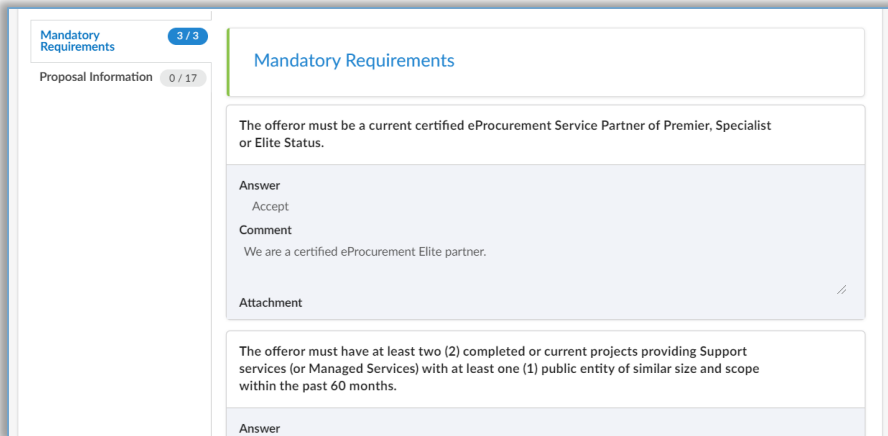
5

Click on the **Proposal** hyperlink to open it.



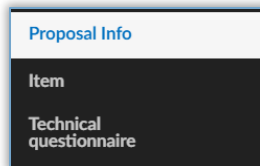
6

The questionnaire response is displayed. Review the answers to the questions as appropriate.



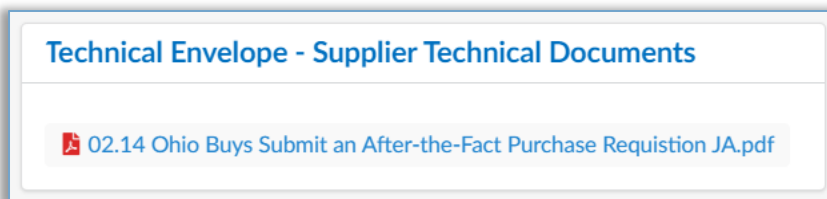
7

To review any attachments associated with the response, navigate to the **Proposal Info** tab.



8

Relevant documents to the component of the Supplier's response are displayed. Click on the name of the document to download it.

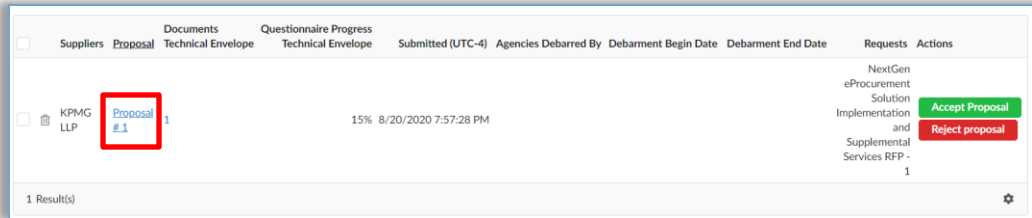


9

When you have finished reviewing the response for that section, click the **X** icon to close it.

## Step-by-Step Instructions for Reviewing Bidder/Supplier Responses and Attachments

When conducting a Double or Triple Envelope solicitation, the user must either accept or reject each response after reviewing it.



If the Supplier's response is acceptable, click **Accept Proposal** to validate it.

Accept Proposal

If the Supplier's response does not meet the requirements for the solicitation, click **Reject Proposal**.

Reject proposal

- ▲ Note that Single Envelope proposals do **not** need to be accepted or rejected in this manner.
- ▲ Note that Double and Triple Envelope proposals must be accepted and/or rejected individually for each envelope. Before a user can move on to the next corresponding envelope, they must complete the response evaluations for that envelope.
- ▲ Note that only the Sourcing Responsible user is able to accept or reject a proposal in OhioBuys.

# REQUEST BIDDER/SUPPLIER CLARIFICATIONS WITHOUT A NEW LOT OR ROUND

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
<b>Analyzing and Awarding Solicitations</b>					
Review Bidder/Supplier Submitted Responses and Attachments		✓	✓	✓	

## Overview

- What's Covered: The process for submitting a request for bidder or supplier clarifications without creating a new lot or round
- Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
- Used When: Additional information is required from a bidder or supplier

### Step-by-Step Instructions for Reopening a Proposal

1

▲ Note that the option to reopen a Supplier's proposal is only available on RFQs, RFPs and IFPs, and only if the appropriate Advanced Option on the Prepare Solicitation tab is selected

Log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

2

The Sourcing Projects page is displayed. On this page, you can enter search terms to locate your solicitation. Enter search terms in the Keywords search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, RFx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** (⌵) icon.

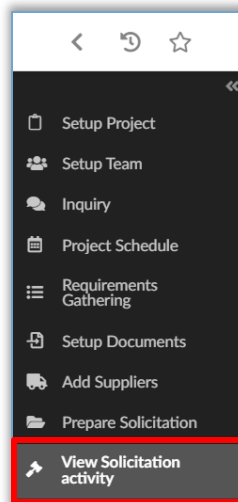
3

Open the sourcing project you would like to edit by clicking the **Pencil** (✎) icon.

Solicitation ID	Sourcing Project Name	Solicitation Type	Workflow Status	Commodity	Contracting Entity	Sourcing Step Shortcuts
✎ SRC0000000814	MWK Sourcing Project Test	Triple Envelope		• Livestock		

4

Navigate to the **View Solicitation Activity** tab.



## Step-by-Step Instructions for Reopening a Proposal

5

Navigate to the **Bid Follow-Up** section of the View Solicitation Activity Tab.

6

Click **Manage Proposals**.

7

Select the bidder(s) and/or supplier(s) that you would like to solicit additional information from by clicking the **Checkbox** (☐) icon.

8

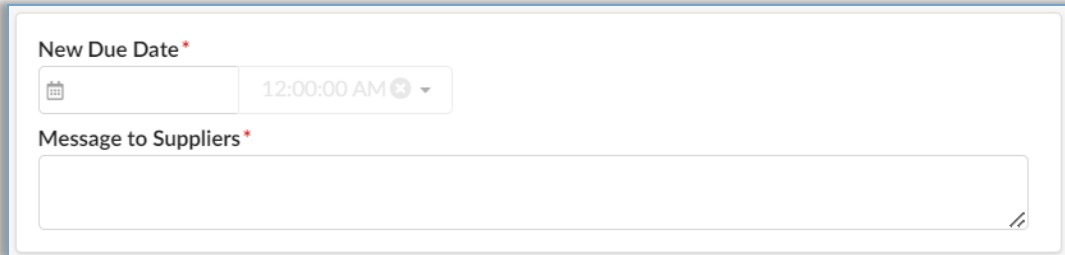
Click **Reopen Proposals**



## Step-by-Step Instructions for Reopening a Proposal

9

Select the **New Due Date** and complete the **Message to Suppliers** field with information explaining the need for them to resubmit their proposal.



The screenshot shows a form with two main sections. The first section is titled 'New Due Date' with a red asterisk. It contains a date picker icon and a time dropdown menu currently set to '12:00:00 AM'. The second section is titled 'Message to Suppliers' with a red asterisk. It contains a large, empty text area for typing a message. A small edit icon is visible in the bottom right corner of the text area.

- ▲ Respondents will have until the date and time indicated in the New Due Date field to resubmit their proposals with any necessary updates.

10

Click **Reopen Selected Proposals**.



A blue rectangular button with white text that reads 'Reopen Selected Proposals'.

- ▲ Suppliers will receive an email notification that there has been a request for their proposals to be resubmitted.
- ▲ Suppliers **must** resubmit their proposal in order for it to be awarded – previous submissions will not be eligible for award. Users should be explicit regarding this expectation when sending their message to the invited Supplier(s).

# COMPLETE RESPONSE EVALUATIONS (SIMPLE OR SINGLE ENVELOPE)

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
Analyzing and Awarding Solicitations					
Complete Response Evaluations (Simple/Single Envelope)	✓	✓			

## Overview

- What's Covered: The process for reviewing responses and attachments submitted for Simple and Single Envelope OhioBuys solicitations and completing evaluations
- Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
- Used When: Evaluating responses to a solicitation

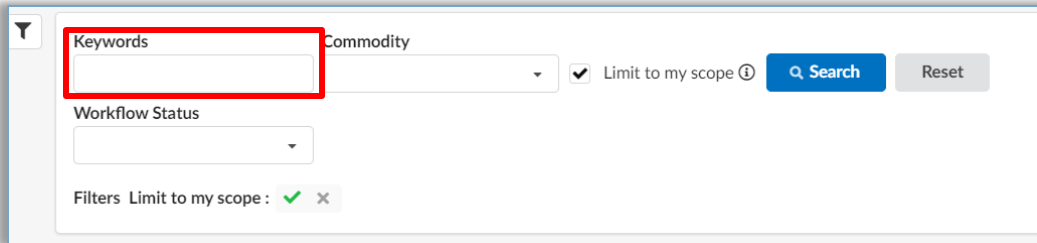
## Step-by-Step Instructions for Completing Response Evaluations


1

Log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

2






The Sourcing Projects page is displayed. On this page, you can enter search terms to locate your solicitation. Enter search terms in the Keywords search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.



▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, RFx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** (  ) icon.

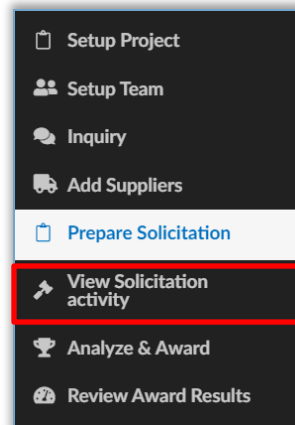
3

Open the sourcing project you would like to edit by clicking the **Pencil** (  ) icon.

Solicitation ID	Sourcing Project Name	Solicitation Type	Workflow Status	Commodity	Contracting Entity	Sourcing Step Shortcuts
 SRC0000000814	MWK Sourcing Project Test	Triple Envelope		• Livestock		   

4

Navigate to the **View Solicitation Activity** tab.



### Step-by-Step Instructions for Completing Response Evaluations

5

Responses to the solicitation are displayed on the **Evaluation Follow Up** section. You are able to search for the response that you would like to evaluate by keywords, Supplier, evaluator, or status. When you have found the response(s) that you would like to evaluate, click the **Checkbox** ( ☐ ) icon and select **View & Score Evaluations** to open it.

<input type="checkbox"/>	Questionnaire	Evaluator	Supplier	Proposal	Progress	Status	Score	Disqualified	Last reminder
<input checked="" type="checkbox"/>	NextGen eProcurement Solution Implementation and Supplemental Services RFP	BAILEY KYLE	KPMG LLP	Proposal # 1	<div><div></div></div> 18% progress	In progress	0	<input type="checkbox"/>	
1 Result(s)									

View & Score Evaluations

6

Scroll down to the **Questionnaire** section. Complete the evaluation as appropriate according to the question evaluation format, as well as providing any necessary comments and attachments.

The Offeror provided evidence of company history, years in business, number of employees, financial stability and capacity to do the work.

5.00

Strong  
Comment  
Click or Drag to add a file

7

Click the **X** icon to close the response when you are finished reviewing it. The **Score** column will automatically update with the score for that Supplier's proposal

Evaluation follow-up

Bid Follow-Up

Lot1 : Req. 11/3/2020 (Round 1)

Keywords

Supplier

Evaluator

Status

Training  
PrintingContractAnalyst25,

Q Search

Reset

0 Selected

View & Score Evaluations

Send Reminder

<input type="checkbox"/>	Questionnaire	Evaluator	Supplier	Proposal	Progress	Status	Score	Disq
<input type="checkbox"/>	Req. 11/3/2020	Training PrintingContractAnalyst25	CAREWORKS TECHNOLOGIES	Proposal # 1	<div><div></div></div> 100%	In progress	1	
<input type="checkbox"/>	Req. 11/3/2020	Training PrintingContractAnalyst25	ASSETWORKS LLC	Proposal # 1	<div><div></div></div> 100%	In progress	5	

2 Result(s)

Repeat this process for each response.

- ▲ Note that only Sourcing Responsible users are able to input these scores.
- ▲ If required, the Sourcing Responsible user may disqualify a Supplier by navigating to the **Bid follow-up** section, clicking the **Status** (●) icon next to the Supplier's name, and clicking **OK** in the pop-up window that appears.

# COMPLETE RESPONSE EVALUATIONS (DOUBLE OR TRIPLE ENVELOPE)

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
Analyzing and Awarding Solicitations					
Complete Response Evaluations (Double/Triple Envelope)			✓	✓	

---

## Overview

- What's Covered: The process for reviewing responses and attachments submitted for Double and Triple Envelope OhioBuys solicitations and completing evaluations
- Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
- Used When: Evaluating responses to a solicitation

### Step-by-Step Instructions for Completing Response Evaluations

1

Log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

2

The Sourcing Projects page is displayed. On this page, you can enter search terms to locate your solicitation. Enter search terms in the Keywords search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, RFx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** (⌵) icon.

3

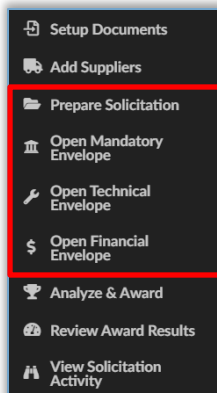
Open the sourcing project you would like to edit by clicking the **Pencil** (✎) icon.

Solicitation ID	Sourcing Project Name	Solicitation Type	Workflow Status	Commodity	Contracting Entity	Sourcing Step Shortcuts
✎ SRC0000000814	MWK Sourcing Project Test	Triple Envelope		• Livestock		🔍 📄 👤 💬

4

Navigate to the **Open Mandatory Envelope**, **Open Technical Envelope**, or **Open Financial Envelope** tab as appropriate.

▲ Users must order envelopes in the following order: Mandatory, Technical, and Financial. The number of envelopes will depend on what type of sourcing project was selected.



### Step-by-Step Instructions for Completing Response Evaluations

Navigate to the **RFx Evaluations** tab.

Responses to the solicitation are displayed. You are able to search for the response that you would like to evaluate by keywords, Supplier, evaluator, or status. When you have found the response(s) that you would like to evaluate, click the **Checkbox** (☐) icon and select **View & Score Evaluations** to open it.

<input type="checkbox"/>	Questionnaire	Evaluator	Supplier	Proposal	Progress	Status	Score	Disqualified	Last reminder
<input checked="" type="checkbox"/>	NextGen eProcurement Solution Implementation and Supplemental Services RFP	BAILEY KYLE	KPMG LLP	Proposal # 1	<div><div></div></div>	In progress 18% progress	0	<input type="checkbox"/>	

1 Result(s)

**View & Score Evaluations**

Scroll down to the **Proposal Evaluation** section. Complete the evaluation as appropriate according to the question evaluation format, as well as providing any necessary comments and attachments.

Click **Submit All Evaluations**.

**Submit All Evaluations**

Repeat this process for each response in the section. When you are finished evaluating all of the appropriate responses in an envelope as well accepting or rejecting each proposal in that envelope, click **Close Envelope**.

**Close Envelope**

Repeat this process for any remaining envelopes, clicking **Begin Evaluation** at the start of each.

**Begin Evaluation**

▲ Note that only Sourcing Responsible users can input these scores.

**Return to  
Navigation Page**

# REVIEW RESPONSE EVALUATIONS

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
Analyzing and Awarding Solicitations					
Review Response Evaluations	✓	✓	✓	✓	

---

## Overview

- What's Covered: The process for reviewing evaluations to Bidder and/or Supplier responses within OhioBuys as a non-scoring evaluator
- Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
- Used When: Reviewing evaluations of responses to a solicitation



## Step-by-Step Instructions for Reviewing Response Evaluations

1

Log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

2

The Sourcing Projects page is displayed. On this page, you can enter search terms to locate your solicitation. Enter search terms in the Keywords search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, RFx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** (⌵) icon.

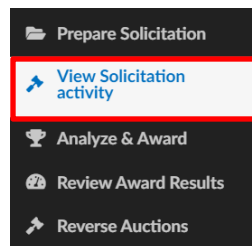
3

Open the sourcing project you would like to edit by clicking the **Pencil** (✎) icon.

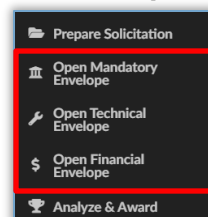
Solicitation ID	Sourcing Project Name	Solicitation Type	Workflow Status	Commodity	Contracting Entity	Sourcing Step Shortcuts
✎ SRC0000000814	MWK Sourcing Project Test	Triple Envelope		• Livestock		🔍 📄 👤 💬

4

a) For a **Single Envelope** or a **Simple** solicitation, navigate to the **View Solicitation Activity** tab.



b) For a **Double** or **Triple Envelope** solicitation, first navigate to the **Open Mandatory Envelope**, then the **Open Technical Envelope**, or **Open Financial Envelope** tab as appropriate. Note that they must be reviewed in the above order.



## Step-by-Step Instructions for Reviewing Response Evaluations

5

Click the **Proposal** hyperlink for the offer that you want to view.

<input type="checkbox"/>	Suppliers	Documents	Questionnaire Progress	Submitted (UTC-4)	Agencies Debarred By	Debarment Begin Date	Debarment End Date	Requests	Actions
		Technical Envelope	Technical Envelope						
<input type="checkbox"/>	KPMG LLP	<a href="#">Proposal #1</a>	1	100%	8/20/2020 7:57:28 PM			NextGen eProcurement Solution Implementation and Supplemental Services RFP - 1	Proposal Accepted
1 Result(s)									

▲ Note that only Sourcing Responsible users are able to input scores for evaluations in OhioBuys.

6

The response is displayed. Review the details of the Bidder or Supplier's response. You can view the responses to the questionnaire within OhioBuys, or you can download the responses to an Excel spreadsheet by clicking **Download in Excel Format**.

KPMG LLP's proposal

Save Save & Close

Proposal Info

Item

Technical questionnaire

Financial questionnaire

Overview

Project: NextGen eProcurement Solution Implementation and Supplemental Services RFP - KPMG LLP

Supplier: KPMG LLP

Organization: DAS-Administrative Services

Answered by: Karumi Dipan

Contract:

Commodity: 43210000 - Computer Equipment and Accessories

Answer Questionnaire

Access Questionnaire OR Download in Excel 2007-2010 format (xlsx) Download in Excel 97-2003 format (xls)

Mandatory Requirements 3 / 3

Proposal Information 0 / 17

Mandatory Requirements

When you have finished reviewing, click the **X** icon to close the proposal.

# ANALYZE SUBMITTED RESPONSES

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
Analyzing and Awarding Solicitations					
Analyze Submitted Responses	✓	✓	✓	✓	

---


## Overview


- What's Covered: The process of analyzing and comparing multiple responses to a solicitation in OhioBuys
- Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
- Used When: Preparing to award a solicitation






Step-by-Step Instructions for Analyzing Submitted Bids

1 Log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

2 The Sourcing Projects page is displayed. On this page, you can enter search terms to locate your solicitation. Enter search terms in the Keywords search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, RFx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** (  ) icon.

3 Open the sourcing project you would like to edit by clicking the **Pencil** (  ) icon.

Solicitation ID	Sourcing Project Name	Solicitation Type	Workflow Status	Commodity	Contracting Entity	Sourcing Step Shortcuts
 SRC0000000814	MWK Sourcing Project Test	Triple Envelope		• Livestock		   

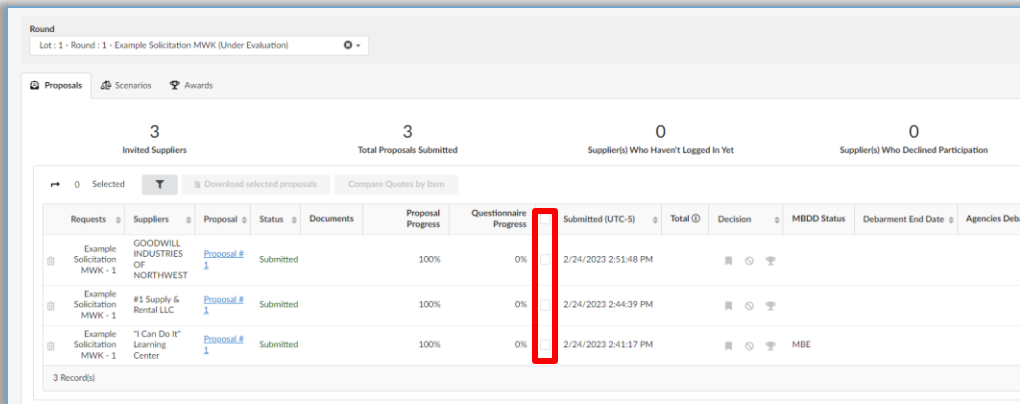
4 Navigate to the **Analyze & Award** tab.

- Setup Team
- Inquiry
- Project Schedule
- Requirements Gathering
- Setup Documents
- Add Suppliers
- Prepare Solicitation
- Open Mandatory Envelope
- Open Technical Envelope
- Open Financial Envelope
- Analyze & Award**
- Review Award Results
- View Solicitation Activity

## Step-by-Step Instructions for Analyzing Submitted Bids

5

The Analyze and Award tab is displayed. Clicking the **Filters** (  ) icon slows users to search for a specific proposal by either Keyword or Status.



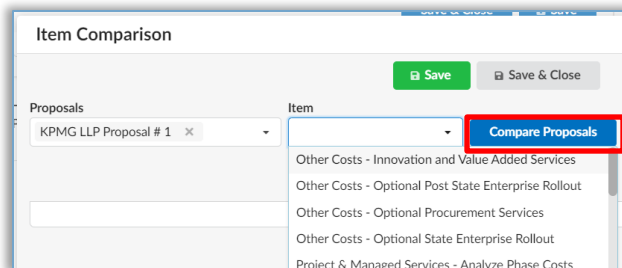
Requests	Suppliers	Proposal	Status	Documents	Proposal Progress	Questionnaire Progress	Submitted (UTC-5)	Total	Decision	MBDO Status	Debarment End Date	Agencies Debarred
Example Solicitation MWK - 1	GOODWILL INDUSTRIES OF NORTHWEST	<a href="#">Proposal # 1</a>	Submitted		100%	0%	2/24/2023 2:51:48 PM					
Example Solicitation MWK - 1	#1 Supply & Rental LLC	<a href="#">Proposal # 1</a>	Submitted		100%	0%	2/24/2023 2:44:39 PM					
Example Solicitation MWK - 1	"I Can Do It" Learning Center	<a href="#">Proposal # 1</a>	Submitted		100%	0%	2/24/2023 2:41:17 PM			MBE		

Click the **Checkbox** ( ☐ ) icon(s) next to each of the proposals you would like to analyze. Then click **Compare Quotes by Item**.

Compare Quotes by Item

6

The Item Comparison window is displayed. Select the item(s) you would like to compare from the drop-down menu, then click **Compare Proposals**.



Item Comparison

Proposals: KPMG LLP Proposal # 1

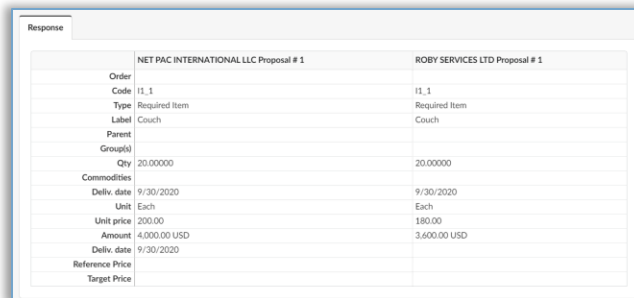
Item:

- Other Costs - Innovation and Value Added Services
- Other Costs - Optional Post State Enterprise Rollout
- Other Costs - Optional Procurement Services
- Other Costs - Optional State Enterprise Rollout
- Project & Managed Services - Analyze Phase Costs

Compare Proposals

7

The responses for selected Suppliers for a particular item are displayed.



	NET PAC INTERNATIONAL LLC Proposal # 1	ROBY SERVICES LTD Proposal # 1
Order Code	11, 1	11, 1
Type	Required Item	Required Item
Label	Couch	Couch
Parent		
Group(s)		
Qty	20.00000	20.00000
Commodities		
Deliv. date	9/30/2020	9/30/2020
Unit	Each	Each
Unit price	200.00	180.00
Amount	4,000.00 USD	3,600.00 USD
Deliv. date	9/30/2020	
Reference Price		
Target Price		

Save & Close

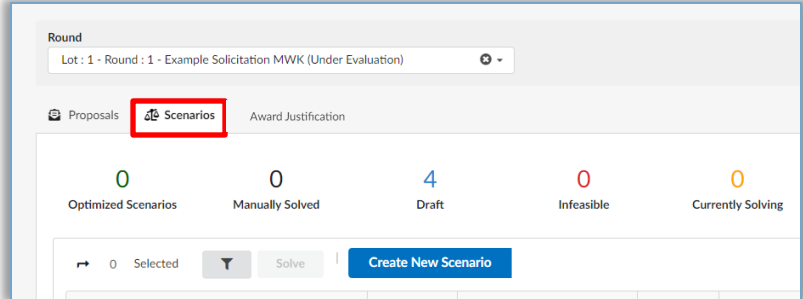
Complete this process as appropriate for all remaining items. When you are finished, click **Save & Close**.

- ▲ On some item grids, the Unit Price column is required by default. By making this column required, Suppliers will be required to enter a price in the item grid before they can submit a response.

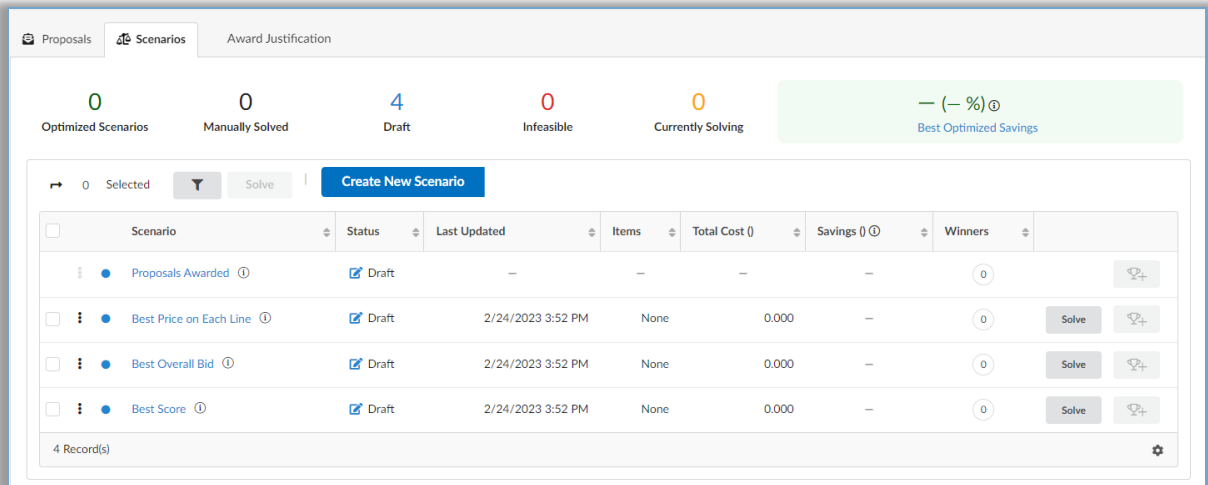
## Step-by-Step Instructions for Analyzing Submitted Bids

8

Navigate to the **Scenarios** tab.



Options for configuring the award are displayed.

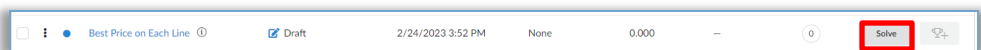
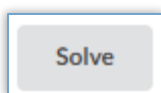


9

OhioBuys offers 3 preconfigured awarding scenarios that users can choose to leverage directly from the Scenarios tab. Options include:

- **Best Price on Each Line:** Creates a scenario where awards are made on a per-line basis to the lowest bidder on each line
- **Best Overall Bid:** Creates a scenario where the award is determined by the lowest overall bid
- **Best Score:** Creates a scenario where the award is determined by the highest overall score

To run a preconfigured scoring scenario, users can click the **Solve** button on the left side of that scenario.



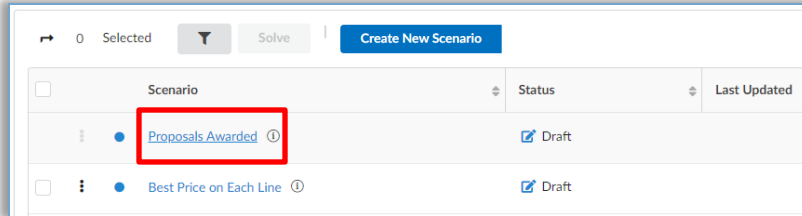
To award a scenario, click the **Trophy Button**.



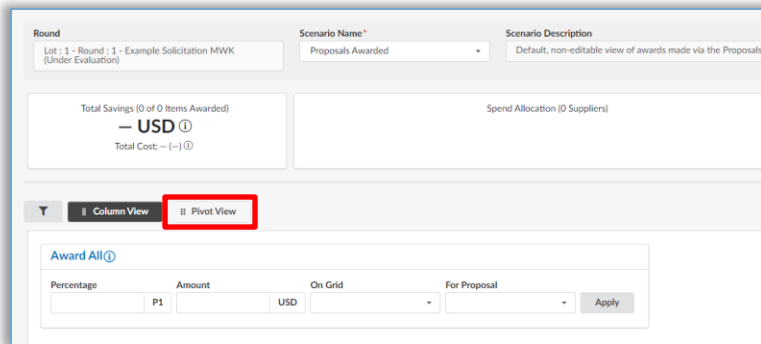
- ▲ If a preconfigured scenario fails, users can click the hyperlink in the **Scenario** column and manually review the awarding criteria, and select an award.

## Step-by-Step Instructions for Analyzing Submitted Bids

To manually analyze the bid responses and/or if you want to make the award based on other criteria, click the **Proposals Awarded** hyperlink in the Scenario column.



Select the **Pivot View** header to see a complete comparison of the proposals.

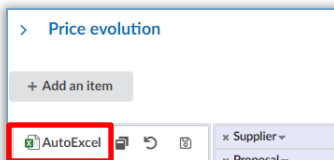


Detailed information comparing the proposals is displayed.

[illegible]

Best prices for a particular item will be highlighted in green. The combined evaluation score for each proposal is displayed in the Rating row on this tab.

- ▲ This data can also be exported to Excel for additional evaluation by clicking **AutoExcel**. After downloading this excel file, it can be uploaded to the Setup Documents tab using the Public Proposals document type so that they can be shared as part of a public records request. Uploading documents in this manner (for solicitations that are not Quick Quotes or RFQs) and clicking the **Approve** button on the solicitation will also result in the documents being publicly posted until the solicitation's publication end date is reached.



# CREATE AWARD SCENARIOS AND AWARD A SOLICITATION

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
Analyzing and Awarding Solicitations					
Create Award Scenarios	✓	✓	✓	✓	

## Overview

- What's Covered: The process for creating and viewing award scenarios for a solicitation in OhioBuys
- Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
- Used When: Determining an award for a solicitation



## Step-by-Step Instructions for Creating Award Scenarios and Awarding a Solicitation

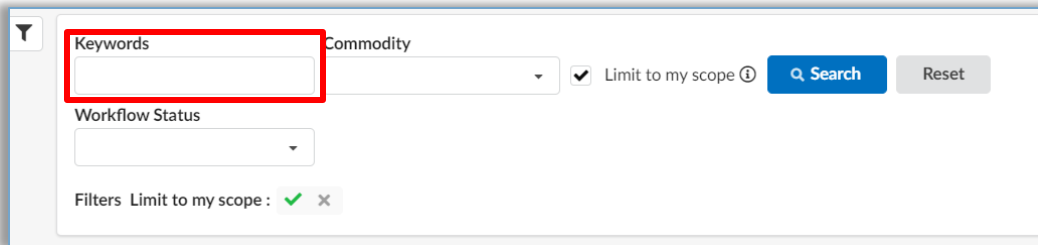
1

▲ Note that the following process detailing award scenarios is optional. To award a solicitation without using scenarios, refer to the [Award a Solicitation](#) section. Note that the award created in this guide is a draft award. The winning Bidder and/or Supplier(s) are not notified.

Log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

2





The Sourcing Projects page is displayed. On this page, you can enter search terms to locate your solicitation. Enter search terms in the Keywords search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.



▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, RFx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** (⌵) icon.

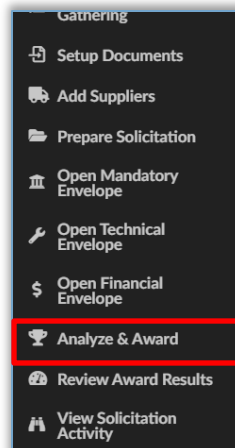
3

Open the sourcing project you would like to edit by clicking the **Pencil** (✎) icon.

Solicitation ID	Sourcing Project Name	Solicitation Type	Workflow Status	Commodity	Contracting Entity	Sourcing Step Shortcuts
✎ SRC0000000814	MWK Sourcing Project Test	Triple Envelope		• Livestock		   

4

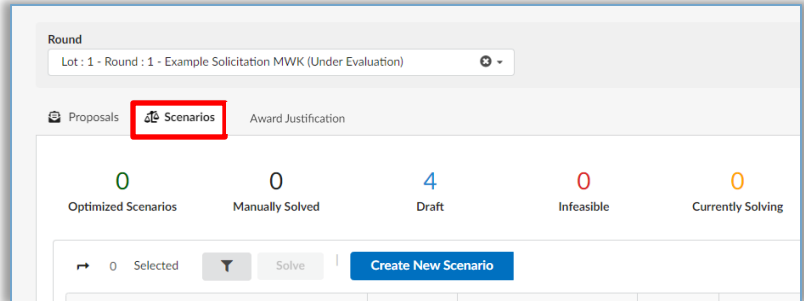
Navigate to the **Analyze & Award** tab.



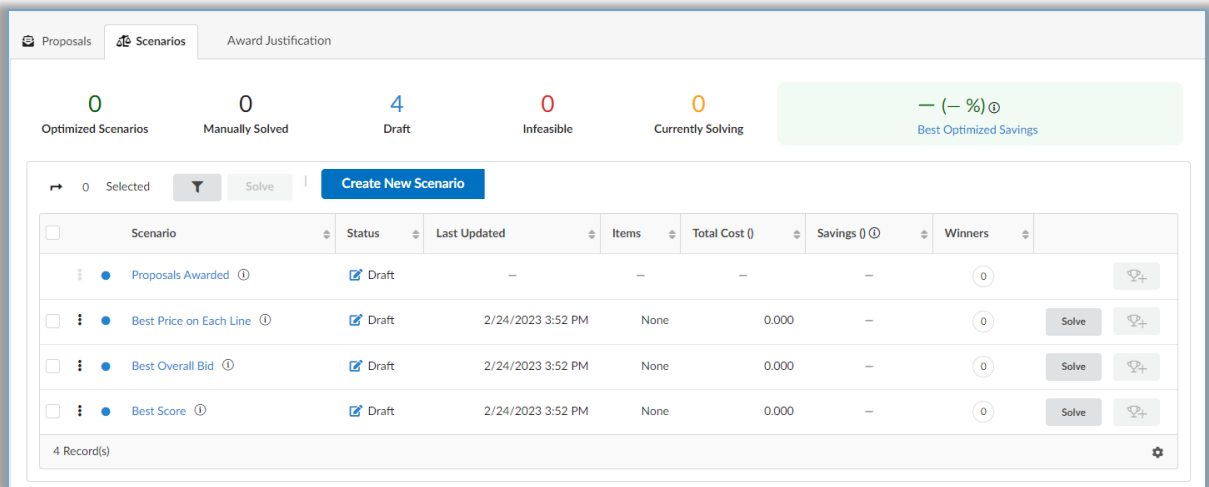
## Step-by-Step Instructions for Creating Award Scenarios and Awarding a Solicitation

5

Navigate to the **Scenarios** tab.



Options for configuring the award are displayed.

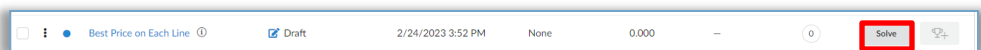
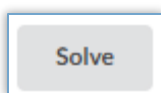


6

OhioBuys offers 3 preconfigured awarding scenarios that users can choose to leverage directly from the Scenarios tab. Options include:

- **Best Price on Each Line:** Creates a scenario where awards are made on a per-line basis to the lowest bidder on each line
- **Best Overall Bid:** Creates a scenario where the award is determined by the lowest overall bid
- **Best Score:** Creates a scenario where the award is determined by the highest overall score

To run a preconfigured scoring scenario, users can click the **Solve** button on the left side of that scenario.



To award a scenario, click the **Trophy Button**.



- ▲ If a preconfigured scenario fails, users can click the hyperlink in the **Scenario** column and manually review the awarding criteria, and select an award.

## Step-by-Step Instructions for Creating Award Scenarios and Awarding a Solicitation

To create a new award scenario, click **Create New Scenario**, input a **Scenario Name** and **Description**, then click **Save & Close**.

Create New Scenario



Create Scenario

[Save](#) [Save & Close](#)

Scenario Name\*  
New Scenario

Description

7 Click the **Scenario** hyperlink that appears for the new award scenario.

Scenario	Status	Last Updated	Items	Total Cost (USD)	Savings (USD) ⓘ	Winners
Proposals Awarded ⓘ	Draft	—	—	—	—	0
Best Price on Each Line ⓘ	Draft	3/22/2023 5:31 PM	None	0.000	—	0
Best Overall Bid ⓘ	Draft	3/22/2023 5:31 PM	None	0.000	—	0
Best Score ⓘ	Draft	3/22/2023 5:31 PM	None	0.000	—	0
Scenario 2 ⓘ	Draft	—	None	0.000	—	0

Complete the Award All fields appropriately.

Award All ⓘ

Percentage Amount On Grid For Proposal

P1  USD

[Apply](#)

- Percentage – Awarding based on percentage
- Amount – Awarding based on dollar amount
- On Grid – Select the grid for the item(s) you intend to award to a particular Supplier
- For Proposal – Select the Supplier that you intend to give the award to for the purposes of this scenario

The Award Scenario will automatically update based on your selected criteria. Click **Apply**.

Apply

Alternatively, users can scroll down to the **Response** section and make awards based on quantity, percentage, or dollar amount at the line item level.

Response

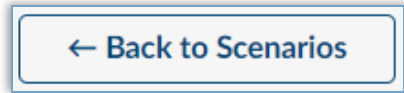
#1 Supply & Rental LLC Proposal...

Code	Label	Estimated Usage	Award	Unit price	Dollar date	Supplier Attachments	Comments	Amount	Qty	%age	USD
11_1	Jackson County Service Provisions	400.00000		75.000				30,000.000			
Total								30,000.000			

## Step-by-Step Instructions for Creating Award Scenarios and Awarding a Solicitation

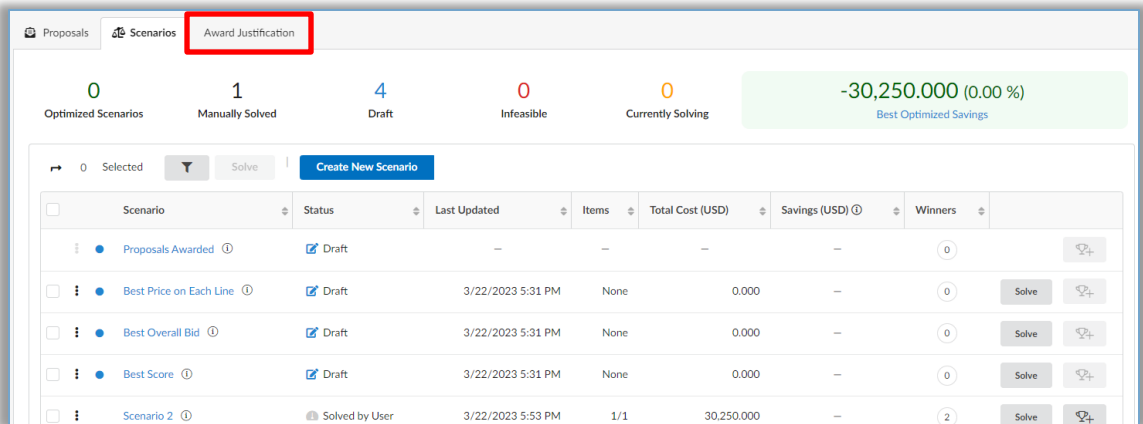
9

After configuring the award scenario, click **Save**. Then click **Back to Scenarios**.



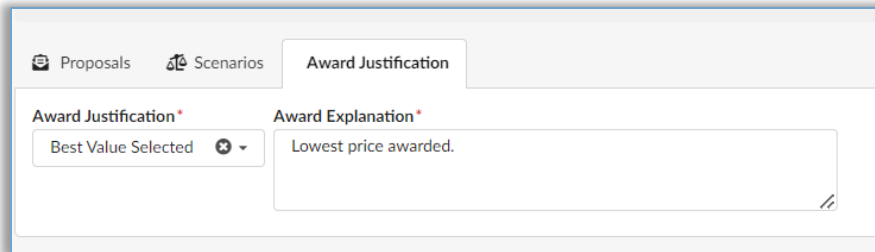
10

Repeat steps 7-9 to create additional scenarios as appropriate. Once you have created an award scenario that you would like to use, navigate to the **Award Justification** tab.



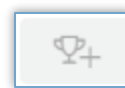
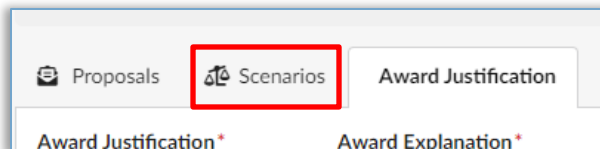
11

Complete the **Award Justification** and **Award Explanation** fields. Then click **Save**.



12

Return to the **Scenarios** tab and click the **Trophy Button** next to the scenario you would like to award



A draft award has been created for the Bidders and/or Suppliers indicated in the chosen award scenario.

▲ If utilizing the award scenario process outlined in this learner guide, the solicitation process is now complete. Users should refer to the Creating and Managing Contracts Learner Guide for additional information on converting the results of the solicitation into a contract in OhioBuys.

**Step-by-Step Instructions for Creating Award Scenarios and Awarding a Solicitation**

In the case that additional preference factors need to be analyzed (e.g., BuyOhio, Veteran-owned businesses (VBE)), follow the process to manually award as outlined above. For more information on preferences, please refer to [Section 2.13 of PM-01](#) for the most up-to-date State policies and procedures.

# AWARD A SOLICITATION

	Simple Solicitation	Single Envelope	Double Envelope	Triple Envelope	Public Notice
Analyzing and Awarding Solicitations					
Award a Solicitation	✓	✓	✓	✓	

## Overview

- What's Covered: The process for awarding a solicitation to a Bidder and/or Supplier(s) in OhioBuys
- Roles: Contract Analysts, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, and Agency Contract Analysts, Procurement Managers, Agency Sourcing Associates
- Used When: Awarding a solicitation to a Bidder and/or Supplier(s) and not leveraging Award Scenarios

## Step-by-Step Instructions for Awarding a Solicitation

▲

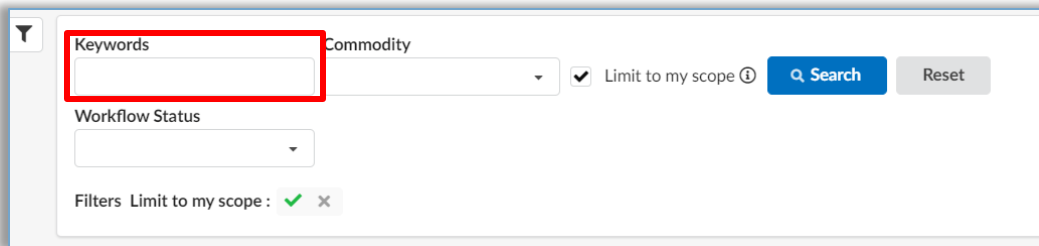
Note that the award created using this guide is a draft award. The winning Bidder and/or Supplier(s) are not notified.

1

Log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

2





The Sourcing Projects page is displayed. On this page, you can enter search terms to locate your solicitation. Enter search terms in the Keywords search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.



▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, RFx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** (▼) icon.

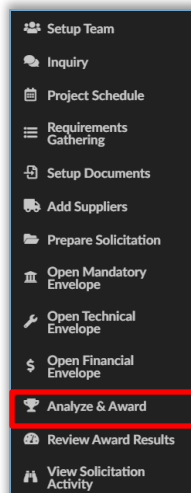
3

Open the sourcing project you would like to edit by clicking the **Pencil** (✎) icon.

Solicitation ID	Sourcing Project Name	Solicitation Type	Workflow Status	Commodity	Contracting Entity	Sourcing Step Shortcuts
✎ SRC0000000814	MWK Sourcing Project Test	Triple Envelope		• Livestock		   

4

Navigate to the **Analyze & Award** tab.



Step-by-Step Instructions for Awarding a Solicitation

Navigate to the **Award Justification** tab and complete the **Award Justification** and **Award Explanation** fields.

Proposals Scenarios **Award Justification**

0 Optimized Scenarios 1 Manually Solved 4 Draft 0 Infeasible 0 Currently Solving

-30,250.000 (0.00 %) Best Optimized Savings

0 Selected Solve Create New Scenario

Scenario	Status	Last Updated	Items	Total Cost (USD)	Savings (USD)	Winners
Proposals Awarded	Draft	-	-	-	-	0
Best Price on Each Line	Draft	3/22/2023 5:31 PM	None	0.000	-	0
Best Overall Bid	Draft	3/22/2023 5:31 PM	None	0.000	-	0
Best Score	Draft	3/22/2023 5:31 PM	None	0.000	-	0
Scenario 2	Solved by User	3/22/2023 5:53 PM	1/1	30,250.000	-	2






Proposals Scenarios **Award Justification**

**Award Justification \*** Best Value Selected

**Award Explanation \*** Lowest price awarded.

Return to the **Proposals** tab and click the **Trophy** (🏆) icon next to the Supplier that you want to award.

Requests	Suppliers	Proposal	Status	Documents	Proposal Progress	Questionnaire Progress	Submitted (UTC-5)	Total	Decision	MBDD Status
Example Solicitation MWK - 1	GOODWILL INDUSTRIES OF NORTHWEST	<a href="#">Proposal # 1</a>	Submitted		100%	0%	2/24/2023 2:51:48 PM		  	

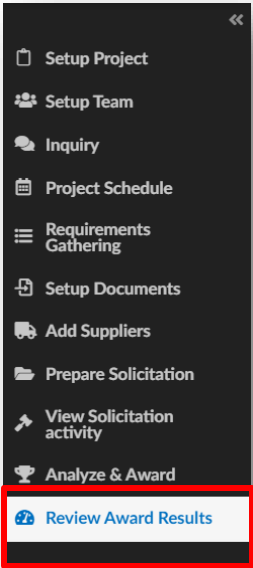
Click **OK**.

OK



Step-by-Step Instructions for Awarding a Solicitation

To notify a supplier of an award decision, navigate to the **Review Award Results** section.



In the Notification column, click on **Selected: to be notified** or **Not selected: to be notified** to generate a email notification for the selected Supplier.

Supplier	Lot / Round	OAKS ID	Proposal	Decision	Notification	Contract
ASSETWORKS LLC	Lot : 1 / Round : 2	0000164503	Copy of Proposal # 1	Not selected	Not selected: to be notified	
CAREWORKS TECHNOLOGIES	Lot : 1 / Round : 2	0000067707	Copy of Proposal # 1	Selected 7,740,000 USD	Selected : to be notified	[CTR002602] ODH-Contract-... <a>Create/Update a contract</a>
ROLTA ADVIZEX TECHNOLOGIES LLC	Lot : 1 / Round : 2	0000090713	Copy of Proposal # 1	Not selected	Not selected: to be notified	
3 Result(s)						

## Step-by-Step Instructions for Awarding a Solicitation

Send an e-mail

Send Send & Close

Message

Send to

Company Name	User
CAREWORKS TECHNOLOGIES	Add Supplier Contact(s) *
	Careworks Kurt

1 Result(s)

Email

Subject

Solicitation update : Selected

Attachments

Click or Drag to add files

Send me a copy

Message

Dear [\${contact\_firstname}] [\${contact\_lastname}],

The Agency - UNDEFINED has completed evaluation of the 2633 - ODH - Solicitation - Curious George and is pleased to award UNDEFINED - UNDEFINED to CAREWORKS TECHNOLOGIES.

Issuance of a purchase order by an Ordering Agency will authorize work or provision of supplies under this Contract.

We wish to express our appreciation to you and your company for responding to this CTR002602

For further details, you may log in to the portal [https://env01.ivalua.us/buyer/ohio/devevol8/wy27c/page.aspx/en/ctr/contract\\_manage\\_extranet/ODH-Contract-Curious George](https://env01.ivalua.us/buyer/ohio/devevol8/wy27c/page.aspx/en/ctr/contract_manage_extranet/ODH-Contract-Curious George)

Thank you,  
OhioBuys

Select at least one **Supplier Contact** and then edit the notification email as needed. Attachments can be added as well as copy sent for personal records. Click **Send & Close** to send the email.

**Note:** Notifying a supplier of an award notification is optional.

## Step-by-Step Instructions for Awarding a Solicitation

Once the sourcing project has been processed into a purchase order or contract, users should move the sourcing project from a Under Evaluation status into a Closed status. To do this, navigate to the Prepare Solicitation tab of the sourcing project and click Approve. Note that you will not be able to update the award after moving a sourcing project into a Closed status.

The screenshot displays the 'Prepare Solicitation' tab in the OhioBuys system. At the top, there is a navigation bar with buttons: 'Save & Close', 'Save', 'Cancel', 'Approve' (highlighted with a red box), 'Open', and 'Other Actions'. Below this, the 'Selected Lot - Round' dropdown is set to 'Lot : 1 - Round : 1 - rfq test (Closed)'. The main content area is divided into several sections: 'Setup' (with sub-tabs: Items, Documents, Confirm Invited Suppliers, Questionnaire, Evaluation Questionnaire, Workflow), 'Sealed Bids' (showing a message 'Bids are now available 6/8/2021 12:03:34 PM' and 'by KIM Erica'), 'RFx Settings' (with 'Solicitation Status' set to 'Under Evaluation' and 'Workflow Status' set to 'Under Evaluation'), and 'Open and Closure' (with 'Begin Date' set to '6/3/2021 4:36:06 PM' and 'Closing Date' set to '6/3/2021 4:36:06 PM').

This concludes the Solicitation Learner Guide. At this point, users would begin the contracting process by creating a new contract from this draft award. For more information, please refer to the Creating and Managing Contracts Learner Guide.

Creating, Managing, and Awarding Solicitations

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# APPENDIX

### Step-by-Step Instructions for Awarding Based on a Combined Score

In order to evaluate and award solicitations based on the combined technical and cost score, the Double Envelope Sourcing Project Type and the Request for Proposal (RFP) RFX Type are leveraged. In Triple Envelope instances, the mandatory questionnaire would contain disqualifying questions, but would not have a weighted score associated with it.

By default, OhioBuys will average the Technical and Financial Evaluation Scores and display this on the Price Synthesis section of the Analyze & Award tab. If your solicitation requires that the Technical and Financial Evaluation Scores are **not** evenly weighted (e.g., the Technical Score is worth 65%, the Cost Score is worth 30%, and MBE participation is worth 5%), please refer to the following steps on how to set up your sourcing project.

Prior to starting to create your Technical and Financial Questionnaires in OhioBuys, determine the weights you will be assigning to Technical Evaluation Score, Cost Score, and/or MBE participation. In this example, we will be assigning the following weights:

1. Technical Evaluation Score: 65% of the overall score
2. Cost Score: 30% of the overall score
3. MBE Participation: 5% of the overall score

As part of this calculation, take note of the weight of the Technical Evaluation Score as you will need to insert a placeholder evaluation question in your Financial Evaluation Questionnaire equal to that weight so the combined Technical and Financial Evaluation Score is correctly calculated. For this example, our Technical Evaluation Score is worth 65% and our Financial Evaluation Score is worth 35% (Cost Score + MBE Participation).

The RFP contains Item Grids, a Technical Envelope, and a Financial Envelope:

1. The Item Grid contain items (product or services) the State would like the Suppliers to bid on.

Code (V) *	Type (V) *	Label (V) *	Cost (V)	Total Contract (V)	Commodity
I1_7	Required Item				
I1_1	Required Item	Cost per push to plow entire facility			72102903 - Snow removal services
I1_2	Required Item	Cost per push to salt entire facility			72102903 - Snow removal services
I1_3	Required Item	Cost per push to hand shovel			72102903 - Snow removal services
I1_4	Required Item	Cost per spread of Calcium Chloride			72102903 - Snow removal services
I1_5	Required Item	Cost per push to plow entire facility le...			72102903 - Snow removal services
I1_6	Required Item	Cost per spread of Calcium Chloride le...			72102903 - Snow removal services
6 Result(s)					

### Step-by-Step Instructions for Awarding Based on a Combined Score


- The Technical Envelope contains a Technical Questionnaire and an Evaluation Questionnaire. The Technical Questionnaire contains a list of questions allowing Suppliers to provide the proposal deliverables and other information required by the RFP. The Technical Evaluation Questionnaire allows the State evaluators to assess the proposals based on defined criteria. Each evaluation question, sub-section and section carries weights defined by the analyst.

Technical Questionnaire:

The screenshot shows a 'Technical Proposal' form with four questions. Each question has a 'Scored' button in the top right corner, which is highlighted by a red box. The questions are:

- Please upload your transmittal letter. This letter includes information that: - Identifies the bidder
- Please describe in detail your organizational experience, including information on the background of your firm, and at least 2 prior engagements of similar nature.
- Please upload your technical approach and work plan. Technical approach and work plan that indicates how the proposer plans to implement the solution.
- Please upload your personnel qualifications. Must include names, resumes, and prior relevant engagement experience.

▲ In this example, there are four questions that make up the Technical Questionnaire. Since there is a corresponding scoring rubric for how these responses will be evaluated, none these questions are individually scored.

▲ After configuring questions, users should navigate to the Technical Evaluation Questionnaire section of the Prepare Solicitation tab, click **Edit Questions & Scoring** and then click the **Setup Weight** (  ) button available on the Scoring Tab.

The screenshot shows the 'Questionnaire Builder' interface with the 'Scoring' tab selected. The 'Setup Weight' button, represented by a weight icon, is highlighted by a red box.

Technical Evaluation Questionnaire:

The screenshot shows the 'Technical Evaluation Questionnaire' interface. It includes a table with columns for 'Type', 'Section/Question', 'Weight', and 'Score'. The 'Weight' column is highlighted by a red box.


Type	Section/Question	Weight	Score
Section	Technical Proposal	65,000	100%
Question	Please upload your transmittal letter. This letter includes information that: - Identifies the bidder	10,000	15%
Question	Please describe in detail your organizational experience, including information on the background of your firm, and at least 2 prior engagements of similar nature.	10,000	15%
Question	Please upload your technical approach and work plan. Technical approach and work plan that indicates how the proposer plans to implement the solution.	15,000	23%
Question	Please upload your personnel qualifications. Must include names, resumes, and prior relevant engagement experience.	15,000	23%
Question	Did the respondent follow all instructions when submitting their proposal?	15,000	23%
Question	Has the respondent been disbarred by any Ohio agency or government entity?	15,000	23%

▲ Enter the total weight of the Technical Evaluation Questionnaire in the Section Weight field. In this example, we have entered 65 and assigned scoring question weights of 10, 10, 15, 15, 15, and 15 for each component of the Technical Evaluation Questionnaire scoring rubric.

### Step-by-Step Instructions for Awarding Based on a Combined Score

- The Financial Envelope contains a questionnaire and an Evaluation Questionnaire. The Financial Questionnaire includes one placeholder question that allows all Suppliers to provide the same answer. The Financial Evaluation Questionnaire contains a Price Mark question that automatically calculates a score based on the Suppliers bids towards the item grids, and a question that automatically scores the placeholder question. The Price Mark question and placeholder question each carry weights defined by the analyst.

#### Financial Questionnaire:

- ▲ The placeholder question in this example is “Cost Summary Provided?” and the only answer a Bidder or Supplier can respond with is “Yes”. Having a placeholder question is required for the Financial Questionnaire if your solicitation requires that the Technical and Financial Evaluation Scores are **not** evenly weighted (e.g., the Technical Score is worth 65%, the Cost Score is worth 30%, and MBE participation is worth 5%).
- ▲ After configuring questions, users should navigate to the Financial Evaluation Questionnaire section of the Prepare Solicitation tab, click **Edit Questions & Scoring** and then click the **Setup Weight** (  ) button available on the Scoring Tab.

#### Financial Evaluation Questionnaire weights:

Type	Section/Question	Weight	% ⓘ
Section	Cost Summary	35.000	100%
Question	Cost Summary Provided?	65.000	65%
Question	Price Mark	30.000	30%
Question	MBE Status	5.000	5%

- ▲ Enter the total weight of the Financial Evaluation Questionnaire (i.e., Cost Summary + MBE Status) in the Section Weight field. In this example, we have entered 35 and assigned scoring question weights of 30 to the Cost Summary Points scoring question and 5 to the MBE Status scoring question. We have also entered a weight of 65 in the “Cost Summary Provided?” placeholder question. In order to have the Financial Evaluation Questionnaire assign a score to a Bidder or Supplier’s submitted price, you are required to insert a Scoring Question that has a Scoring Mode of “Price mark.” A “Price mark” Scoring Question will automatically assign a numerical score between 0 to 5 based on the submitting Bidder or Supplier’s provided item grid responses.





# Version Control

Version	Publish Date	Summary of Updates	Pages Updated
1.0	10/16/20	Initial draft	All
1.1	10/21/20	Added details on evaluation and award based on combined score	35, 118-120
1.2	11/6/2020	Added additional slide on questionnaire setup Added different section on single vs double/triple envelopes in reviewing/awarding Updated Open Solicitations	38, 90-107
1.3	1/5/2021	Added details on how to cancel a solicitation.	88,89
1.4	2/15/2021	Added inviting Bidders with no contacts information. Added clarification on Auditor process. Revised details on evaluation and award based on combined score.	71-72, 94, 125-128
2	3/1/2021	Added Confidential Sourcing Project Checkbox to Create Sourcing Project page. Clarified when Setup Documents materials are made public. Added Documents section to Prepare Solicitation tab. Clarified importance of Question Scored checkbox. Added new page on setting up values for relevant question types.	10, 26, 34, 37, 38

# Version Control

Version	Publish Date	Summary of Updates	Pages Updated
2.1	3/16/2021	Added red asterisk to indicate mandatory Inquiry Dates fields. Added EOD Status to RFX Activity and Analyze and Award tabs. Removed “Solicitation Posted” button steps.	31, 32, 65, 66, 74, 79, 82, 92, 113
2.2	3/31/2021	Noted the ability to disengage Notify Commodity Suppliers when Publicly Post Opportunity is also disengaged	33
2.3	4/13/2021	Noted updates to the “RFx must have at least one item grid” checkbox. Noted the visibility of the non-blocking alert next to Supplier records when they do not have any Supplier contacts.	33-34, 44
2.4	5/10/2021	Updated tables to indicate that Inquiry can apply to Public Notice solicitations	5, 83
2.5	5/11/2021	Added note that Publicly Post Opportunity checkbox can be disengaged, added instructions on Is a Clarification checkbox	33, 79-80
2.6	5/20/2021	Noted to State users that Suppliers must acknowledge T&C before submitting a response, added a note about Suppliers needing to resubmit if there is a new round	74, 80

# Version Control

Version	Publish Date	Summary of Updates	Pages Updated
2.7	6/8/2021	Noted that Summary will automatically populate with contents of Request Description if the solicitation was created from a PR. Noted the need to Close an RFQ or QQ by clicking Approve.	32, 126
2.8	7/22/2021	Added a note about instructing Suppliers to upload all documents as part of their Header in their responses in the Summary section. Added a note about documents and questionnaire responses. Added note that there is a radio button to filter by Suppliers with Supplier Contacts.	32, 41, 44
2.9	8/31/2021	New slides covering information on reviewing who previously unsealed solicitation bids	33-4
3.0	9/3/2021	New page on how to delete inquiries	90
3.1	9/28/2021	Updates to Cancel a Solicitation	95-97
3.2	10/4/2021	Updated OhioBuys logo	All
3.3	10/25/2021	Added details on how to make a field mandatory on an item grid. Added a note on how to notify Suppliers of an awarded bid. Added additional steps on removing an inquiry.	53, 90, 131, 132

# Version Control

Version	Publish Date	Summary of Updates	Pages Updated
3.4	12/2/2021	Moved MBE set aside message	45
3.5	12/9/21	Updated the Create a New Round steps to note that users should Yes or No on the Amendment? field depending on the reason the new round is being created.	80
3.6	12/20/21	The solicitation item grid used on quick quotes is being updated so the Unit Price column is required by default. By making this column required, Suppliers will be required to enter a price in the item grid before they can submit a response.	118
3.7	12/22/21	Updates to Cancel a Solicitation. Use the "fax" mode where it does not send out to the suppliers and let the workflow send a cancellation	98
3.8	1/20/2022	Noted that users can close Clarification lots prior to the close date	87
3.9	1/20/22	Added additional details on how to configure items grids. Added steps on posting a solicitation that is not publicly posted	51-60, 82-83
4.0	1/31/22	Added a note for attachment function when replying to inquiries	33

# Version Control

Version	Publish Date	Summary of Updates	Pages Updated
4.1	2/10/2022	Added a note that this LG does not cover Quick Quotes. Addition required breaking up a section across two pages—adding a page Fixed 2 typos	3-4; 29, 35
4.2	2/15/2022	We would like to recommend including these two methods in the training as alternatives to using the Send Me a Copy feature.	87
4.3	2/22/2022	Added instructions around the Notice feature that was added to the Inquiry tab.	89 - 90
4.4	3/29/2022	Added in additional details for differences between RFI and RFQ. Steps for posting a solicitation to additional suppliers, steps for pulling dealers from a specific contract	33, 50, 85, 86
4.5	5/19/2022	<ul style="list-style-type: none"> <li>- Removed NDA from Advanced Options section and updated Advanced Options screenshots to remove NDA option.</li> <li>- Added note that only Suppliers with a Contact will be added as part of the Other Contracts selector.</li> <li>- Replaced EOD terminology with MBDD in text and images               <ul style="list-style-type: none"> <li>- Removed “Open Automatically” checkbox for cancellation</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>- 35, 77, 95</li> <li>- 50</li> <li>- 98, 133</li> <li>- 110</li> </ul>

# Version Control

Version	Publish Date	Summary of Updates	Pages Updated
4.6	7/8/2022	Changed "Parent Contract" to "Master Contract" and updated screenshots	48, 74
4.7	7/27/2022	Removed instructions to use the Attachment functionality on Inquiry responses	103
4.8	8/31/2022	<ul style="list-style-type: none"> <li>Added notes around automatic population of Inquiry dates and Public Posting dates</li> <li><del>Added note that users will still be able to see solicitation responses on cancelled rounds and lots</del></li> <li>Added guidance around solicitation details as recommended by OPS Training Academy such as process field information, summary field information, and solicitation end dates</li> </ul>	<ul style="list-style-type: none"> <li>33, 95</li> <li><del>112</del></li> <li>32,33,34,76,77,78</li> </ul>
4.9	9/27/2022	<p>Clarified that multiple approvers must approve to advance</p> <p>Added details on how a user can download bid results</p>	15 135
5.0	02/14/2023	Removed verbiage concerning using the Approve button after the award has been selected. It was added to the end of the module with verbiage that aligns more with the Quick Quote Learners Guide information.	146 149